



OPERA

A User Guide

ITS Training
06/02/12

v1.1a

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About this User Guide	<p>This User Guide is designed for new users of OPeRA and focuses on the role of Shoppers and Budget Holders.</p> <p>It is written to accompany the ITS Training classroom delivered course which can be booked via the ITS Training website.</p>
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Conventions

The following conventions are used in this guide:

Convention	Meaning
Bold	Names of objects such as tabs, links and buttons.
<i>Italics</i>	Used to emphasise important points.
“Quotation Marks”	Prompts/options/messages that appear on screen e.g. “Do you want to save changes...”
‘Single quotation marks’	Used to denote field names e.g. ‘Completed’ and ‘Pending’ below: Workflow status <input type="checkbox"/> Completed <input type="checkbox"/> Pending
()	Denotes an optional step in the step-by-step procedures. E.g. (4) means step 4 may be skipped or may not always be required.
NB	Take note! Something important that you should be aware of.
Tip	Handy tips that make your work easier.

Online Help and Information

Follow the link below for additional help and guidance regarding OPeRA:

https://www2.warwick.ac.uk/services/finance/purchasing_and_insurance/opera

User Guide

Copies of the User Guide can be obtained from here:

http://www2.warwick.ac.uk/services/its/servicessupport/training/course_cat/opera/user_guide_to_shopping_with_opera_v1.1a.pdf

1. Introduction to OPeRA

Overview

OPeRA is The University of Warwick's e-Procurement System. (Online Purchasing electronic Requisition Automation)

Through OPeRA, departmental users are able to shop within University approved catalogues, create purchase requisitions, obtain electronic approval and seamlessly distribute Purchase Orders to suppliers.

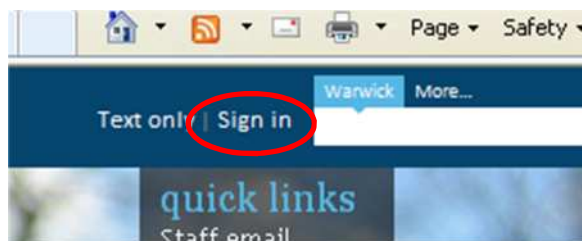
There is currently a range of UoW approved lab, office stationery, electrical and IT suppliers on the new system. Therefore, when you search for an item you will recognise the suppliers and products that come back.

OPeRA works with Internet Explorer, Firefox, Chrome and on PCs, Macs and iPads.

Logging On

OPeRA utilises Single Sign-on. To log on to OPeRA follow the procedure below and the instructions provided by your department about how to access the service.

- 1 Open your web browser, go to the Warwick Intranet site and sign in:



Once you have done this follow your departmental instructions on how to access OPeRA, probably via a link on your departmental homepage.

- (2) The first page you may see if you have not logged on before is the **User Settings/User Identification** tabs in your **profile**. This is shown because as a new user you may wish to complete certain details. If you do make any changes you will need to click on the relevant **Save** or **Update** buttons.

 A screenshot of the 'User Identification' form within the OPeRA system. The form is part of a 'User Settings' section, with tabs for 'Purchasing', 'Permissions', and 'History'. The 'User Identification' tab is active, showing sub-tabs for 'Personal Settings', 'Roles', 'Document Access', 'Email Preferences', and 'Navigation Setup'. The form contains the following fields:

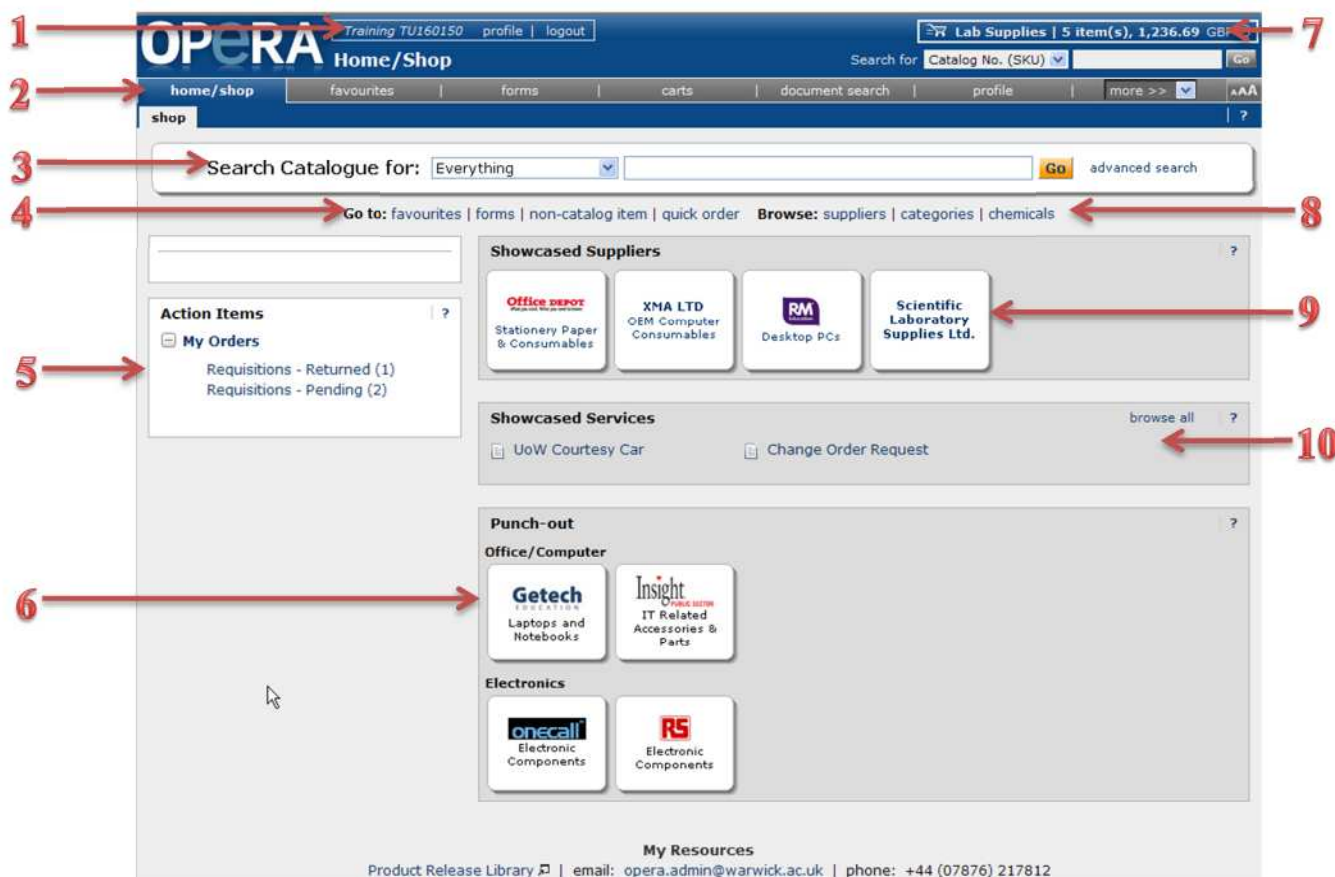
- First Name: Training
- Last Name: User01
- Phone Number: (empty)
- E-mail Address: opera.admin@warwick.ac.uk
- Department: Science Department (dropdown menu)
- Position: (dropdown menu)
- User Name: Traininguser01
- Please enter a question and answer that we can prompt you with should you ever forget your password.
 - Question: (dropdown menu)
 - Authentication Method: Local

 A 'Save' button is located at the bottom right of the form.

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3 Subsequently when logging on you will see the **home/shop** page:



- 1 Profile name (not the same name as your login), profile and logout link.
- 2 Navigation tabs, tab configuration drop down and Text Size selector.
- 3 Search Catalogue field, category drop down and Advanced Search link.
- 4 Go to links including Favourites, non-catalogue order form and quick order.
- 5 Action Items – Showing outstanding Purchase Orders and Requisition Orders.
- 6 Punch out – Suppliers which use their own website for Requisition facilitation.
- 7 Cart information – Showing Active cart or “Select Draft Cart or Add Items to Cart” if empty.
- 8 Browse links - ways to search for items using suppliers, categories and chemical structures.
- 9 Showcased Suppliers – Showing suppliers which UoW encourages the use of.
- 10 Showcase Services – Forms which have unique and useful functions.

2. Creating a Purchase Requisition (PR)

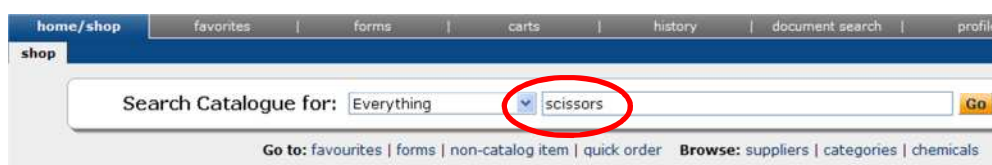
Overview

In this scenario you are going to submit a requisition to purchase a low value item from the catalogue. Other scenarios cover adding multiple items to a cart from a variety of sources and editing default information such as the VAT code. At the end of the process you will place the order and create Purchase Requisition.

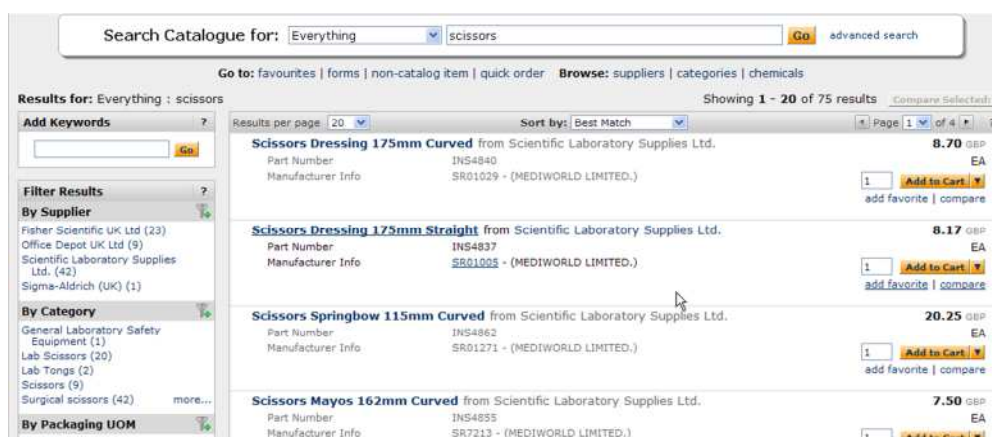
Submitting a Purchase Requisition

The steps below take you through the whole process of searching for a common item from the catalogue, adding it to a draft cart, going to checkout and ensuring all required steps are completed, and then submitting the requisition.

- 1 On the **home/shop** tab type the name of the item you want into the 'Search Catalogue for' field e.g. "scissors" and then click on **Go**:



- 2 A list of items from the catalogue will be returned:



- 3 Apply any required filter using the **Filter Results** panel on the left – "Lab Scissors" is to be selected in this example:



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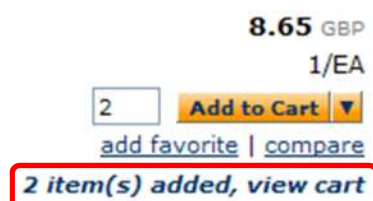
- (4) To remove a filter click on **show all...** or click the **remove selected filter** icon:



- 5 When you have found the item you want change the quantity if necessary and then click on **Add to Cart**:



- 6 A note appears below indicating the item(s) has been added to your cart and a draft cart will be created with a default name if you didn't already have an active cart:



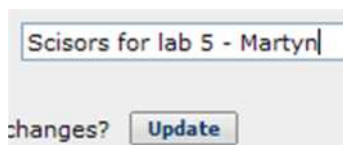
- 7 Go to the cart by clicking on the cart's name (above) or clicking on **view cart** on the results page.



- 8 Make the cart more easily identifiable later by over typing the default name with something more meaningful:



- 9 To save the name click on **Update**:



- 10 Click **Proceed to Checkout** in the top right of the screen:



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- (11) The progress bar across the top of the page indicates any steps (in red) that need to be completed before the requisition can be submitted, *but note the cart could be assigned to someone else at this point as the **Assign Cart** button is active.*

Click on **Cost Collector** if this step is not selected and needs attention:

- (12) Click on **Required field** to enter the cost code:

*NB: If the Cost Collector field has not been defaulted in your profile then you will see four **Required field** boxes above and you will first need to set the Cost Collector to **Cost Centre** before proceeding to the next step.*

- (13) Click into the 'Cost Centre' field and type in cost code.

- (14) Click on **Save**.

- 15 If all required fields in each step are completed the requisition is ready to be submitted:

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- 16 Click on **Submit Requisition**.

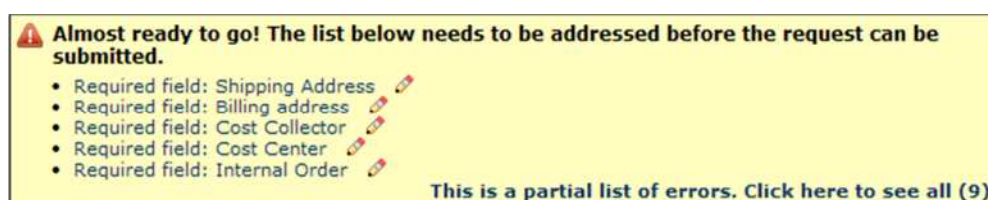
NB. In the live system the button will say **Place Order**.



- 17 A message confirms you have successfully submitted the requisition:



- Tip** At Step 11 above you can go straight to **Final Review** where you will be presented with a summary of all items which need to be resolved before the requisition can be submitted. To resolve these click on each one in turn:



3. Shopping in OPeRA

Overview

This section of the manual covers the essentials of shopping in OPeRA:

- (a) Searching the hosted catalogue
- (b) Comparing items found in the hosted catalogue
- (c) Adding a catalogue item to a cart.
- (d) Adding a non-catalogue item to a cart
- (e) Searching for and adding an item to a cart from a punch-out.

Searching the Hosted Catalogue

This section will show a Shopper/Budget Holder with appropriate permissions how to search for an item using the hosted catalogue.

- 1 After logging in you will find the 'Search Catalogue for' field at the top of the **home/shop** page:

It is recommended that you search **Everything** initially and only select a category if too many irrelevant results are returned.

- (2) The category selector is useful for refining a search for an item like a table. If, for example, you want a table for the office searching **Everything** for "table" is likely to return many results that are not relevant. In this case changing **Everything** to **Furniture** could be helpful.

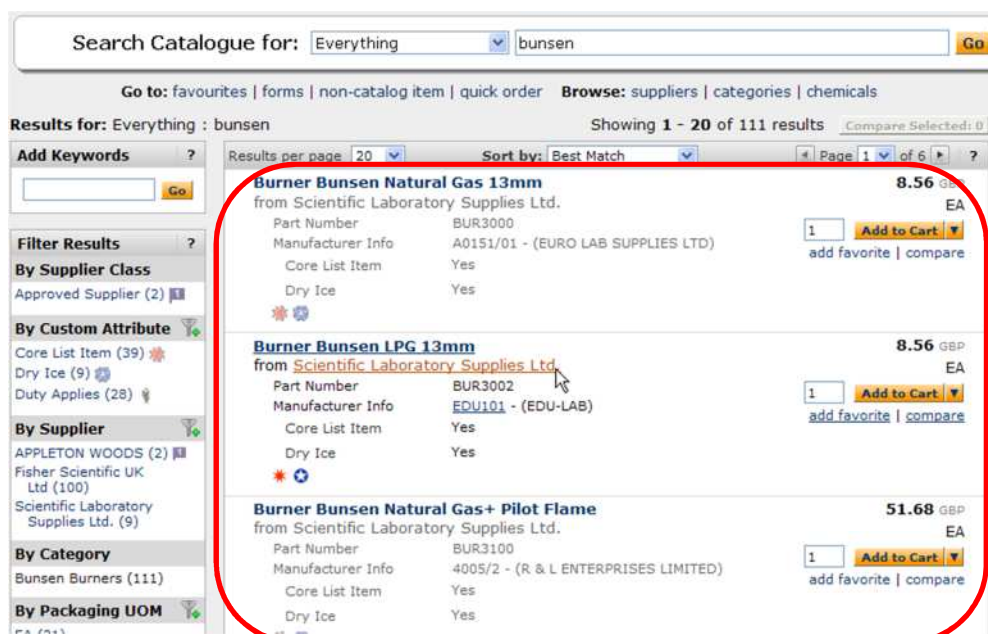
- (3) The **advanced search** link will allow you to define the exact item to find in the hosted catalogue.

But you will need to know certain keywords or part numbers:

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- 4 In this example type in “Bunsen” as in Bunsen Burners and click on **Go**:



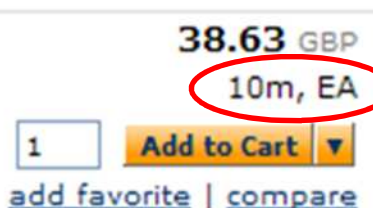
This particular search returned 111 results and the default in OPeRA is to show 20 per page.

Looking at the results notice that the different items have different codes such as:

- 5 **EA** – If this symbol is on its own then the price above it represents price per single item.



- 10m, EA** – If there is a form of measurement before EA then this represents the amount per price.



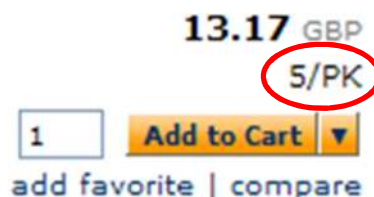
- 1/EA** – This means price per item and is similar to EA above.



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5/PK – If there is a number preceding **PK** this means how many items in a pack and the price is for each pack.



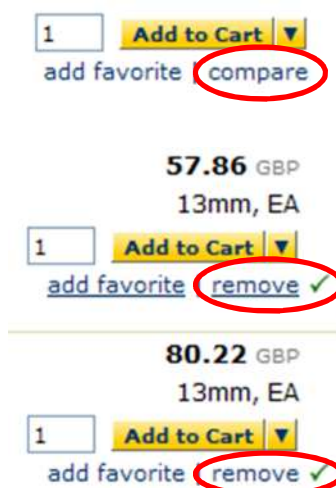
- 6 To put an item into your cart first check the number required is correct then click on **Add to Cart**.

Comparing Items in the Hosted Catalogue

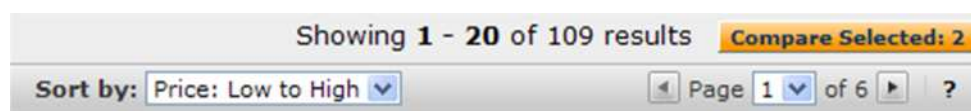
OPeRA allows the Shopper to compare side-by-side items from different suppliers provided they are both in the Hosted Catalogue making it easier to choose the most appropriate one.

- 1 After searching for an item in the hosted catalogue you can compare several items by clicking on **compare** underneath the **Add to Cart** button for each item that you want to compare.

Notice how each **compare** has turned into **remove**; this can be toggled on/off.



- 2 After selecting the items to compare, if needed, scroll back to the top and click on the **Compare Selected** button at the top right of the search page.



- 3 Notice the categories along the left which align each aspect of the multiple items:

Select		
Add to Cart	Qty <input type="text" value="1"/> Add to Cart	Qty <input type="text" value="1"/> Add to Cart
Product Details	Brush Bunsen burner nozzle 5.5mm x 50mm head	Burner Bunsen Natural Gas 13mm
Catalog No.	BUR-420-010V	BUR3000
Price	13.17 GBP	8.56 GBP
Supplier	Fisher Scientific UK Ltd	Scientific Laboratory Supplies Ltd.
Category	Bunsen Burners	Bunsen Burners
UOM	----	----
Price per UOM	2.634 GBP / unit	8.56 GBP / unit
Product Size		

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- (4) To add any item to your cart, check the quantity is correct and click on **Add to Cart**.

- (5) To add multiple items to your cart, tick the boxes above those you require, check the quantity is correct, then click on **Go**:

- 6 When you have finished comparing click on **Back to Search Results**.

Adding a Non-Catalogue item

This section will show how a Shopper/Budget Holder can add a non-catalogue item to a cart. Note that you will need to get information from the supplier, probably from their website, before you can complete this process.

- 1 On the **home/shop** page click on **non-catalog item** to open the form.

- 2 The **Non-Catalog Item** form loads:

- 3 Start to type the name of your supplier into the 'Enter Supplier' field and when the supplier's name appears click on it to select:

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- 4 Type in a detailed description for the required item. This can be obtained from the supplier's website and needs to be consistent with the data required by SAP.

- 5 Complete the 'Suppliers reference number', 'Quantity' and 'Unit Price' fields, and change the 'Packaging' field if necessary:

Suppliers reference number	Quantity	Unit Price		Packaging
VC050	1	69.00	GBP	EA - Each

- (6) The material number is not a required field at this stage of the process, but if you need to add it type it in, or if you don't know it click on the search icon adjacent to the 'Material Number' field:

Product Details
Material Number

Save and Close Save

- (7) Enter any search parameters and click on **Search**.

Commodity Code Search

Code starts with...

Description contains...

Search

- (8) Click **select** adjacent to the appropriate code.

Results per page 20 Results 6 Page 1 of 1

Code	Description	
74008	Hazardous Clinical/Bio waste collection	select
74024	Bio mats-animal/amphib/insect/anthropod	select
74027	Biochemical reagents	select
74028	Bio mats - Microorganism & cell lines	select
74029	Bio mats - Strictly licensed substances	select
74063	Bio mats - Plant/plant mats/seed/soil	select

Results per page 20 Page 1 of 1

- (9) The material number appears in the field.

Material Number 

- 10 Click **Save and Close** to add this item to your cart.

Save and Close **Save and Add Another** **Close**

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- 11 In your cart you will notice the symbol for a non-catalogue item.



Searching a Punch-out Supplier

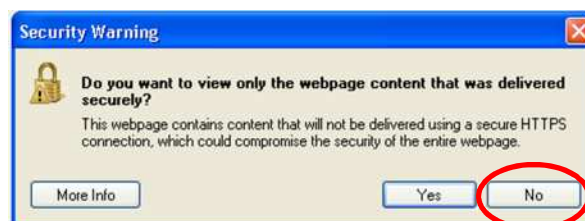
Certain suppliers will have a punch-out option on OPeRA's **home/shop** page which gives you access to their website via OPeRA. Not all that supplier's products may be available via the punch-out, but any that are can be added directly to your OPeRA cart if you want to purchase them.

- 1 Any items you want to buy via a Punch-out will be added to your active cart, so create a new draft cart or make active the cart you want items from the Punch-out website to be added to (*see Section 4, Carts, of this User Guide*).
- 2 Click on the Punch-out you wish to access – Insight in this example.



- (3) If at any point Internet Explorer throws up this **Security Warning** dialogue box, click on **No**.

*If you select **Yes** the Punch-out will stop working.*

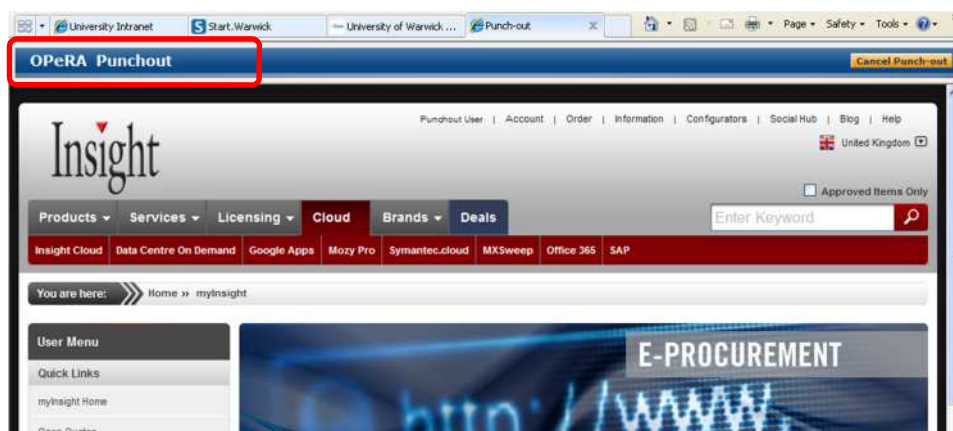


N.B: This is not an issue with Firefox or Chrome.

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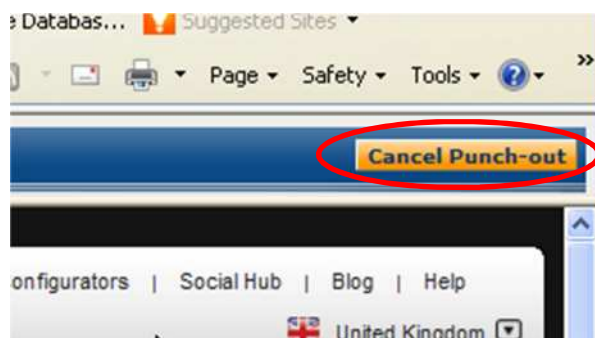
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- 4 The website opens in the OPeRA browser window. It will appear like the website of the company and the only indication you are still using OPeRA will be the blue bar above the browser window which says **OPeRA Punchout**:

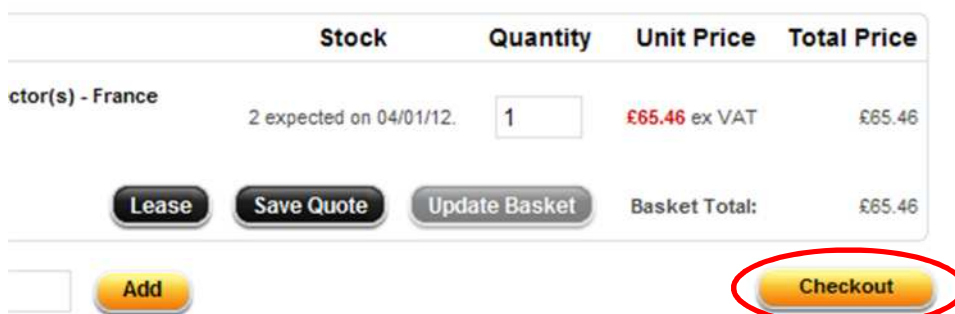


NB: A Punch-out will 'time out' after 30 minutes of inactivity.

- (5) You can leave the Punch-out website and return to OPeRA at any time by clicking on **Cancel Punch-out**.



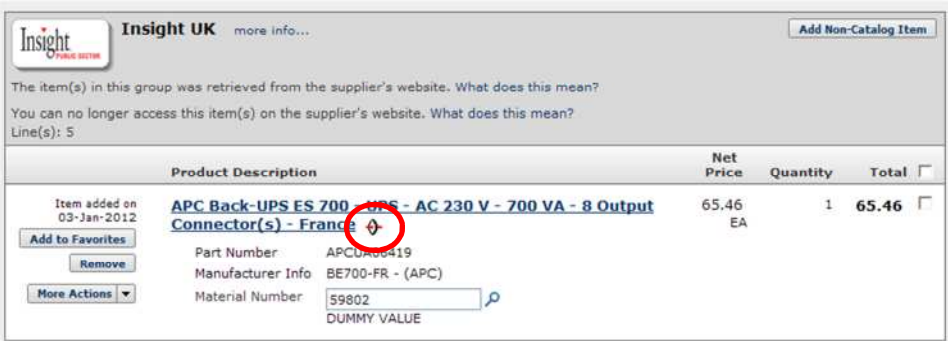
- 6 Search for and add items to your basket as you would normally do so on this website.
- 7 Look for the **Checkout** or **Return to Requisition** button when finished and this will return you to OPeRA:



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- 8 View the item(s) selected from the punch-out in your OPeRA cart and proceed as normal to submit the requisition:



Insight UK [more info...](#) [Add Non-Catalog Item](#)

The item(s) in this group was retrieved from the supplier's website. What does this mean?
 You can no longer access this item(s) on the supplier's website. What does this mean?
 Line(s): 5

Product Description	Net Price	Quantity	Total
Item added on 03-Jan-2012 Add to Favorites Remove More Actions ▼ APC Back-UPS ES 700 - UPS - AC 230 V - 700 VA - 8 Output Connector(s) - France Part Number: APC0A00419 Manufacturer Info: BE700-FR - (APC) Material Number: 59802 DUMMY VALUE	65.46 EA	1	65.46

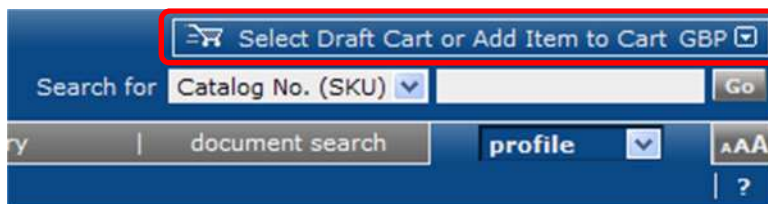
Note the symbol which indicates this item is from a Punch-out:



4. Carts

Overview

When you logon to OPeRA for the first time you will not have a cart selected, referred to as the *active cart*, and you will see the following in the top right of the screen:



Subsequently, after logging on your *active cart* will be the last one you were using if you didn't trigger an action that caused the cart to change its status, such as submit a requisition order:



The following section covers how to create, assign, delete and copy a cart, and how to change your active cart.

Creating a Cart

Any items you wish to purchase will be placed in your *active cart*. If you don't have a cart active then one will be created whenever you click on an **Add to Cart** button when shopping. Alternatively you can create a new draft cart whenever you need to by following the procedure below:

- 1 Select the **carts** tab. If you have no active cart you will see the following:



Otherwise you will see your active cart and will need to click on the **draft carts** tab:



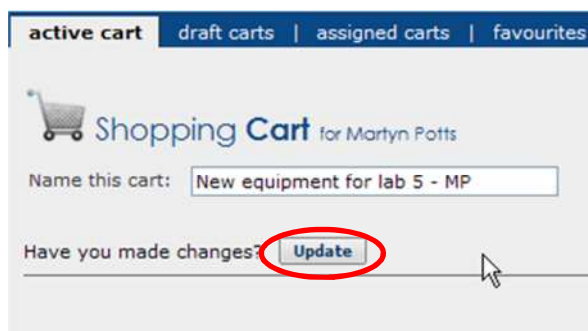
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- 2 Click on **Create Cart**.



- 3 OPeRA will assign a default name for the cart of the date and your username. Rename your cart with a meaningful name. *You must then click on **Update** to save your name change.*



- 4 This is now your active cart and any items you wish to purchase will be added to it as you shop.

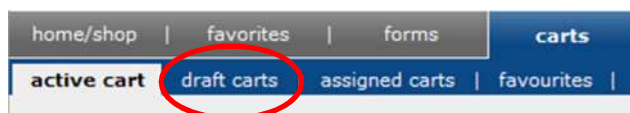
NB

You can rename an active cart at any time (step 3 above) but you must remember to click on **Update** to save your changes

Changing the Active Cart

The active cart is the one to which any items will be added when you click any **Add to Cart** button whilst shopping. You can only have one active cart at a time. To change the active cart follow the steps below:

- 1 From the **cards** tab make sure **draft carts** is selected.



- 2 Your draft carts are listed with the currently active one indicated in blue:

home/shop	favorites	forms	cards	history	document search	profile	more >>	AAA
active cart	draft carts	assigned carts	favourites	my requisitions				
Create Cart								
Assign Substitute								
My Returned Requisitions							legend	?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total (GBP)	Withdraw			
	Martyn's Scissors	20/12/2011		17.30	Withdraw			
	Scissors for lab 5 - Martyn	20/12/2011		17.30	Withdraw			
My Drafts							legend	?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total (GBP)	Delete			
	Flask for lab 5 - Martyn	21/12/2011		79.20	Delete			
	Re-equip lab 3 - MP	22/12/2011		0.00	Delete			
My Drafts Assigned to Others							legend	?
View Cart	Shopping Cart Name	Date Created	Assigned To	Total	Unassign			
	Mirror of lab - Martyn	21/12/2011	Mercy Birgen	37.13	Unassign			

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- 3 To make another cart active click on its 'Active Cart' icon and it will turn blue and become the active cart.

My Drafts	
Active Cart	Shopping Cart Name
	Flask for lab 5 - Martyn
	Re-equip lab 3 - MP

- (4) Clicking on a carts name, e.g. "Re-equip lab 3 – MP" above, will open that cart and also make it active.

Moving items between Carts

Whole carts or specified items within a cart can be moved to a new or existing draft cart. Follow the steps below to move items to a new cart:

- 1 Open the cart you wish to move items from, i.e. make it the active cart.

- 2 Tick 'Select All' in the top right.

OR

Tick the individual items you wish to move:

Product Description	Net Price	Quantity	Total	
GC Tool inspection mirror Thermo Scientific Hypersil-Keystone	7.86	2	15.72	<input type="checkbox"/>
Part Number HCA-225-455T	1/EA	<input type="text" value="2"/>	<input type="button" value="Update"/>	
Manufacturer Info 60180-775 - (Thermo Scientific)				
Material Number 59802				
DUMMY VALUE				
Mirror attachable Leica	15.92	1	15.92	<input checked="" type="checkbox"/>
Part Number MIC-122-020T	1/EA	<input type="text" value="1"/>	<input type="button" value="Update"/>	
Manufacturer Info 13396050 - (Leica Microsystems)				
Material Number 59802				
DUMMY VALUE				
Pipette basket HDPE 133mm x 781mm Thermo Scientific Nalgene	89.14	1	89.14	<input checked="" type="checkbox"/>
Part Number PMR-584-580K	1/EA	<input type="text" value="1"/>	<input type="button" value="Update"/>	
Manufacturer Info DSS241-0050 - (Thermo Scientific Nalgene)				
Material Number 59802				

- 3 Click on the *Perform an action on...* dropdown list and select **Move to Another Cart**.

Perform an action on (6 items selected)... ☒ Select All

15.72

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- 4 A new dialogue box opens. Click on **Move**.

(Alternatively you could use the dropdown to select an existing draft cart and move the items into that.)



- 5 Click on **Close**. OPeRA moves the items to a new draft cart and gives it a default name. You will probably want to change this. To find the new cart go to **draft carts** and look for the one with a default name:

My Drafts		
Active Cart	Shopping Cart Name	Date Created
	2011-12-22 BudgetMartyn 01	22/12/2011
	Copy of my main cart - MP	22/12/2011
	Flask for lab 5 - Martyn	21/12/2011
	Re-equip lab 3 - MP	22/12/2011

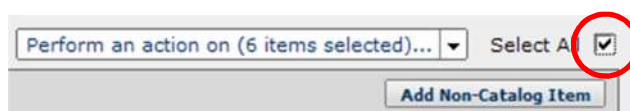
Copying a Cart

Carts or specified items within a cart can be copied to an existing draft cart. *Note you cannot copy to a new cart and so would need to first create an empty draft cart if this is where you wanted things to go. OPeRA will not allow you to copy any items that originated from a Punch-out.* Follow the steps below to copy items to a new cart:

- 1 Open the cart you wish to copy, i.e. make it the active cart.
- 2 Tick 'Select All' in the top right.

OR

Tick the individual items you wish to copy:

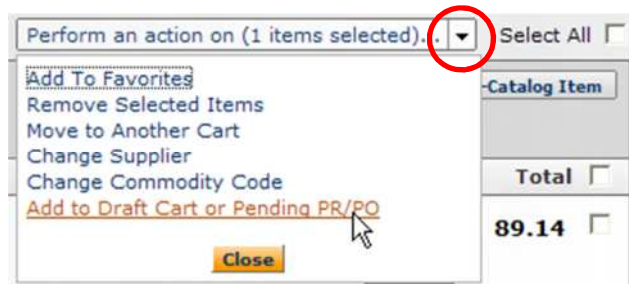


Product Description	Net Price	Quantity	Total	
GC Tool inspection mirror Thermo Scientific Hypersil-Keystone	7.86	2	15.72	<input type="checkbox"/>
Part Number HCA-225-455T	1/EA	<input type="text"/>	<input type="button" value="Update"/>	
Manufacturer Info 60180-775 - (Thermo Scientific)				
Material Number 59802				
DUMMY VALUE				
Mirror attachable Leica	15.92	1	15.92	<input checked="" type="checkbox"/>
Part Number MIC-122-020T	1/EA	<input type="text"/>	<input type="button" value="Update"/>	
Manufacturer Info 13396050 - (Leica Microsystems)				
Material Number 59802				
DUMMY VALUE				
Pipette basket HDPE 133mm x 781mm Thermo Scientific Nalgene	89.14	1	89.14	<input checked="" type="checkbox"/>
Part Number PMR-584-580K	1/EA	<input type="text"/>	<input type="button" value="Update"/>	
Manufacturer Info D55241-0050 - (Thermo Scientific Nalgene)				
Material Number 59802				

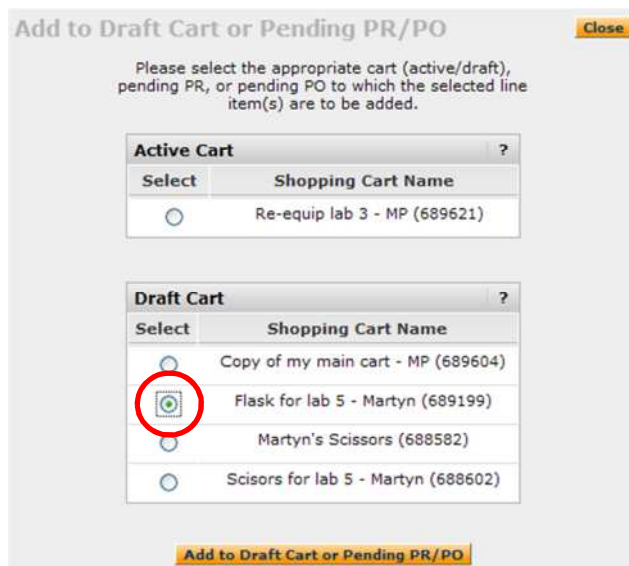
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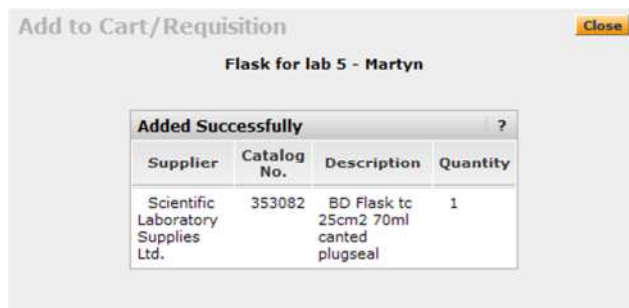
- 3 Click on the *Perform an action on...* dropdown list and select **Add to Draft Cart...**



- 4 A new dialogue box opens. Select the cart you wish to copy the item(s) to and then click on **Add to Draft Cart or Pending PR/PO**.



- 5 You will see confirmation of the action. Click on **Close**.



Assigning a Cart

Once you have prepared a cart you can assign it to someone else to add to or complete. Follow the steps below to assign a cart to a colleague:

- 1 Open the draft cart you wish to assign.
- 2 Click on **Proceed to Checkout**.



Continued on next page...

...continued from previous page.

- 3 Click on **Assign Cart** in the top right of the screen.

- 4 Click on **Search for an assignee**:

- 5 Add your search criteria and click **Search**.

*In the example here only the **Science Department** has been selected.*

- 6 Click **[select]** adjacent to the person you wish to assign the cart to:

New Search					Close
Results per page: 10					
Users meeting the search criteria: 50					Page 1 of 5
Name	User Name	Email	Phone	Action	
Martyn, Approver	ApproverMartyn	m.potts@warwick.ac.uk		[select]	
Tom, Approver	ApproverTom	t.pipkin@warwick.ac.uk		[select]	
Martyn, Budget	BudgetMartyn	M.Potts@warwick.ac.uk		[select]	
Tom, Budget	BudgetTom	t.pipkin@warwick.ac.uk		[select]	
Birgen, Mercy	mbirgen_admin	M.Birgen@warwick.ac.uk		[select]	
Birgen, Mercy	mbirgen_shopper	M.Birgen@warwick.ac.uk	+001 (11) 22334444 ext 55555	[select]	

Continued on next page...

...continued from previous page.

- 7 The name of the assignee is displayed:

You can add a note if required using the 'Note to Assignee' field.

NB: If you tick the 'Add to Profile' box you can find this person quickly next time by using the Select from profile values option.

- 8 Click on **Assign**. The following message will appear:



- 9 Carts you have assigned to others appear at the end of your list of draft carts:

My Drafts Assigned to Others						legend ?
View Cart	Shopping Cart Name	Date Created	Assigned To	Total	Unassign	
	Mirror of lab - Martyn	21/12/2011	Mercy Birgen	37.13	Unassign	
	Re-equip lab 4 - TP	22/12/2011	Budget Tom	318.86	Unassign	

- (10) To get a cart back click on its **Unassign** button and it will become your active cart.

NB

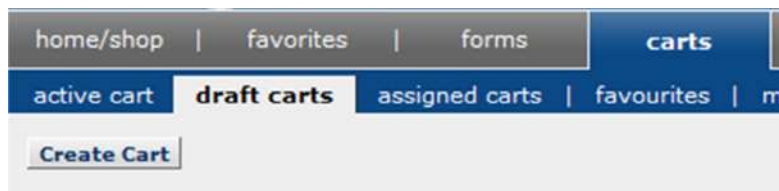
You will find carts that have been assigned to you on the **draft carts** tab in the **Drafts Assigned To Me** section:

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total (GBP)	Delete
	2012-01-16 medical exp AKT	16/01/2012		222.11	Delete
	2012-01-16 MEDICAL EXP CP	16/01/2012		222.11	Delete

Deleting a Cart

Your draft carts can be deleted if you no longer need them:

- 1 Click on the **carts** tab and go to **draft carts**:



- 2 Click on **Delete** adjacent to the cart you wish to delete:

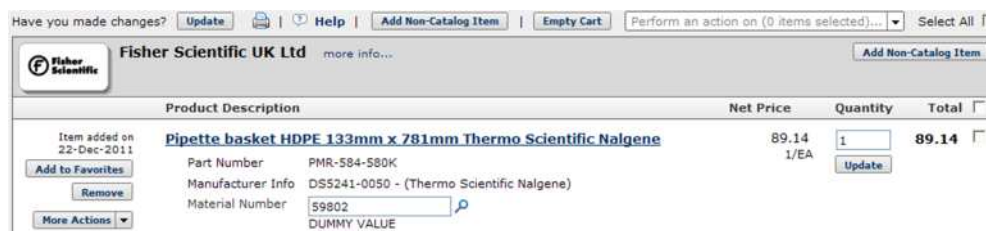
My Drafts					legend ?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total (GBP)	Delete
	2011-12-22 BudgetMartyn 01	22/12/2011		0.00	Delete
	Copy of my main cart - MP	22/12/2011		110.84	Delete
	Flask for lab 5 - Martyn	21/12/2011		0.00	Delete
	Re-equip lab 3 - MP	22/12/2011		318.86	Delete

- 3 *Your cart is deleted. You are not asked to confirm the deletion. You can't get it back once it has gone.*

Editing a Cart

Any cart can be edited to remove items, change quantity required, add an item to favourites etc.

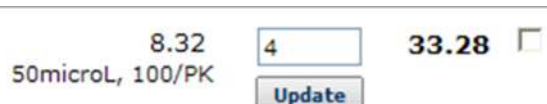
- 1 When viewing a cart before you can carry out any action on an item you must first select it



- 2 The buttons to the right of an item allow you to add it to your favourites, remove it from the cart, or copy/move it to another cart (**More Actions**).



- 3 You can change the quantity of an item in the cart but must then click on **Update** to save that change.



Continued on next page...

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- 4 You can perform actions on multiple items in a cart simultaneously using the **Perform an action on...** dropdown menu. First you need to select the items. Either tick the 'Select All' option to select everything in the cart *OR* tick the box against individual items:

The screenshot shows a shopping cart interface. At the top, there is a dropdown menu labeled "Perform an action on (2 items selected)..." and a "Select All" checkbox, which is highlighted with a red box. Below this is a button labeled "Add Non-Catalog Item". The main part of the interface is a table with columns for "Net Price", "Quantity", and "Total". There are two items listed. The first item has a net price of 89.14, a quantity of 1, and a total of 89.14. Its selection checkbox is checked and highlighted with a red circle. The second item has a net price of 8.32, a quantity of 6, and a total of 49.92. Its selection checkbox is unchecked. Each item row has an "Update" button next to the quantity field.

	Net Price	Quantity	Total	
	89.14 1/EA	1 <input type="button" value="Update"/>	89.14	<input checked="" type="checkbox"/>
	8.32 50microL, 100/PK	6 <input type="button" value="Update"/>	49.92	<input type="checkbox"/>

5. Using Favourites in OPeRA

Overview

In this section of the manual the user will:

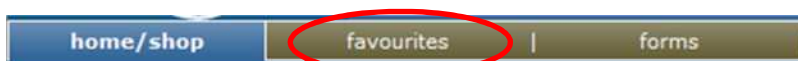
- (a) Setup a favourite's folder and Subfolder.
- (b) Add an item.
- (c) Retrieve this item and put it in their Active cart.

NB: You cannot use favourites with Punch-out suppliers.

Setup a Favourites Folder

This section will show a Shopper/Budget Holder with appropriate permissions how to create a favourites folder in OPeRA.

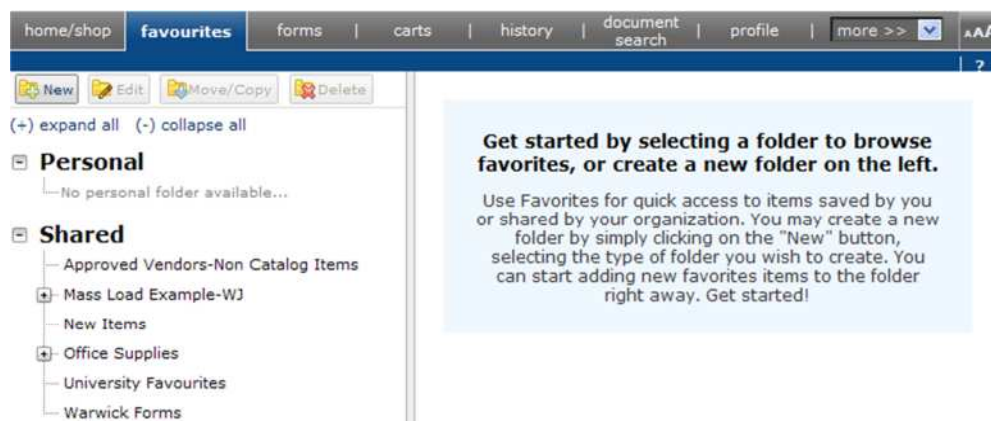
- 1 Click on the **favourites** tab at the top of the page:



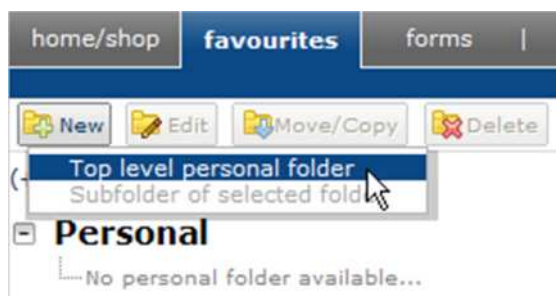
- 2 In favourites you will find two main areas: the **Personal** and the **Shared** categories.

In **Personal** you can create a folder to store your items or combinations of items which you can easily retrieve at a later time.

In **Shared** there are set folders with useful things like forms and favourite items that UoW or your department have created.



- 3 Click **New** and select **Top level personal folder**.

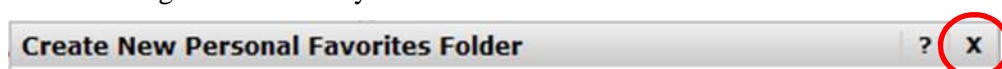


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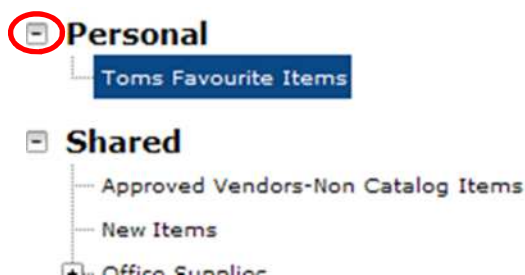
...continued from previous page.

- 4 Type in a name for the folder and a description of its intended contents then click **Save**:

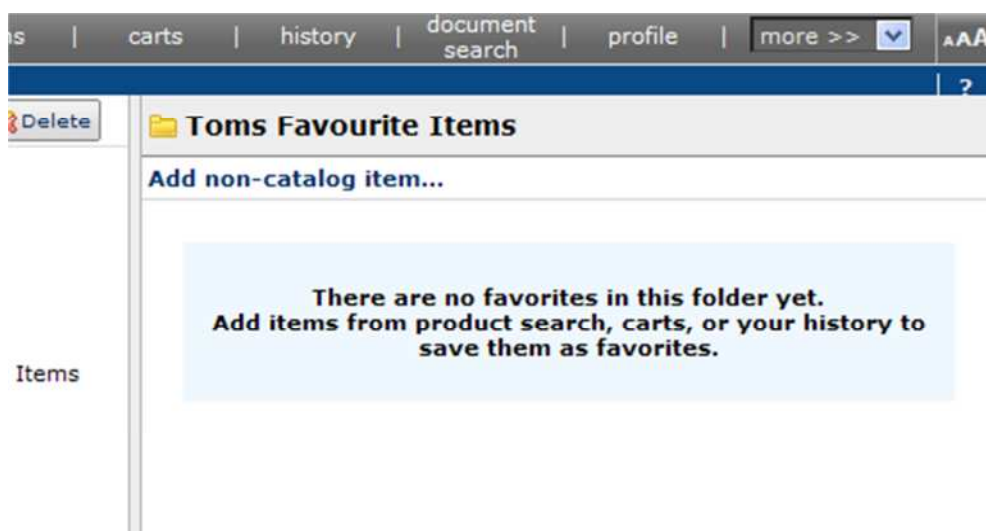
- (5) After clicking **Save** you may need to close the **Create New Personal Favourites Folder** dialogue box manually:



- 6 You may need to click twice on the +/- symbol to the left of **Personal** to display the new folder that you have just created.



- 7 Click on your folder name to see the empty folder:



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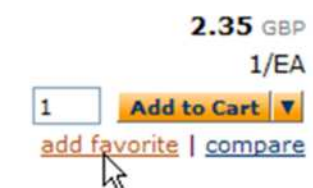
- (8) You can create subfolders within existing folders. Firstly select the folder within which the sub-folder will reside, then click on **New** and select **Subfolder of selected folder**.



Adding to Favourites

You can add items to your Favourites from a number of locations in OPeRA. In each case you will be prompted to select the folder or sub folder into which you want to add the item and then click on **Submit**.

- 1 In search results click on **add favorite** for any item you want to add.



- 2 In a cart click on **Add to Favorites** to the left of the item.



NB If you add a non-catalogue item to favourites you will need to check the price with the supplier before adding to a cart in future because the price may have changed. Manually entered item (such as a non-catalogue item) will not automatically update any changes to details like price.

Using Favourites

To add a favourite into your active cart, follow the steps below:

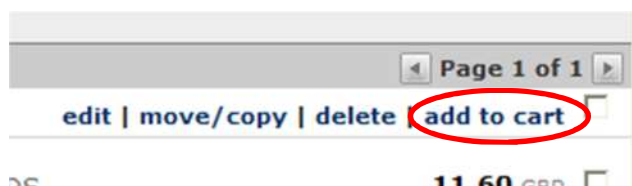
- 1 Click on the **favourites** tab and select the appropriate favourites folder.
- 2 Tick the box adjacent to the favourite(s) you want to add and change the default quantity of 1 if necessary.



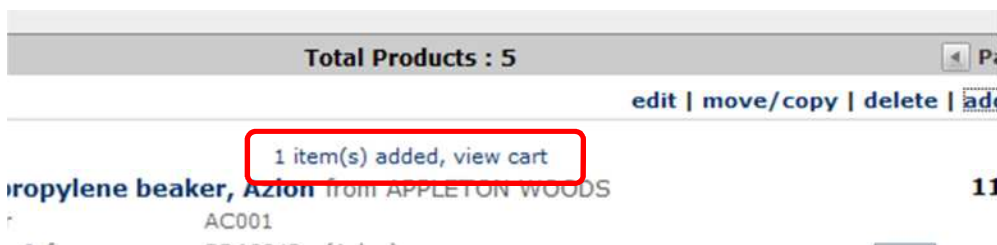
Continued on the next page...

...continued from previous page.

- 3 At the top of the favourites page click on **add to cart**.



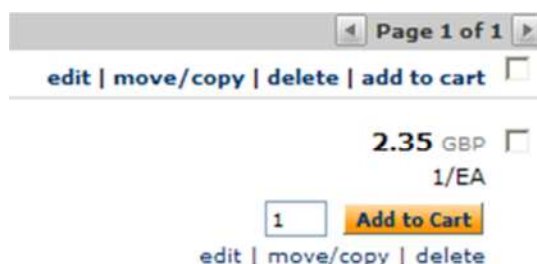
- 4 A note appears at the top indicating the number of items added to your cart:



- (5) To add every item in a folder or sub-folder into your cart, tick the box at the top and then click on **add to cart**, remembering to edit any quantities first if necessary:



- (6) You can move or copy items from one folder to another using the **move/copy** links, delete an item or entire folder using **delete**, and edit the descriptions and default quantities individually or for the entire folder using **edit**.



6. Approving a Requisition in OPeRA

Overview

In this section of the user guide covers some of the actions undertaken by Approvers:

- (a) Approving a Requisition
- (b) Rejecting a Requisition
- (c) Rejecting a line item from a Requisition
- (d) Returning a Requisition

The Approver will be able to search for a Requisition using the OPeRA document search or using the Approver Tab along the top of the interface.

Searching for a Requisition

Here are steps to simply search for a requisition and choose a requisition and assign to yourself in order for you to be able to approve/return or reject:

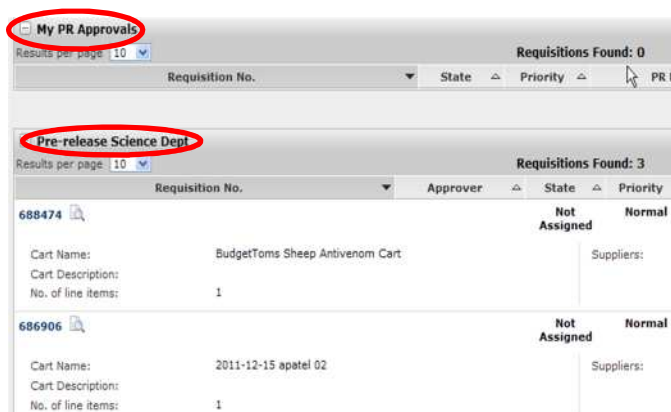
- 1 After logging in the home page will show grey tabs along the top. Click on the **Approvals** tab to access the list of Pending Requisitions.



- 2 The Next page will show two main boxes:

The **My PR Approvals** box shows any Requisitions you have assigned to yourself for Approval.

The **Pre-release** box shows any requisitions which are pending approval by the Approvers in your department.



Continued on next page...

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- 3 If in the Pre-release area there are too many requisitions to sort through and you can't find the requisition you want, you can use the manual filter. Click + symbol next to **Click to filter requisitions**.



Use the drop down to select **Manual Filter**

Choose a date from the drop down.

Click **Search**.

- 4 After finding a requisition you want to approve you can now review it.

Pre-release Science Dept									
Results per page 10		Requisitions Found: 1						Page 1 of 1	
Requisition No.	Approver	State	Priority	PR Date/Time	Requisitioner	Amount	Action		
688474		Not Assigned	Normal	20/12/2011 13:46	Budget Tom	222.11	Assign		
Cart Name:		BudgetToms Sheep Antivenom Cart		Suppliers:		Fisher Scientific UK Ltd			
Cart Description:									
No. of line items:		1							

You can now click on the requisition order number (circled above) to view it in more detail before you approve or reject it.

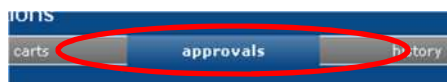
- 5 Below shows the requisition:

While you are viewing this screen you can approve or reject. NB: You can only reject a requisition on this screen, not on the list of requisitions on the previous screen.

Approving a Requisition

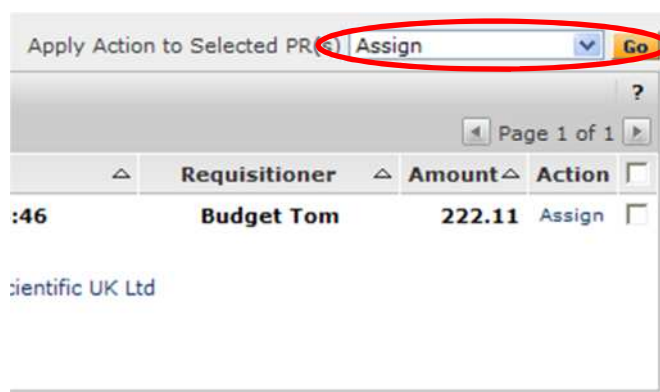
Here are steps following on from Searching for a Requisition which allow you to assign a Requisition to yourself, check it for accuracy and approve it.

- 1 NB: To return to the **My PR Approvals** list click on the Approvals tab at the top of OPeRA.



Notice the **Apply Action to Selected PR(s)** drop down selector, also the **Assign** button.

You can either click the **Assign** button or tick the selected item(s) and choose assign from the drop down.



- 2 After assigning to yourself it will appear in the My PR Approvals box.



Notice now that the button that was previously **Assign**, has changed to **Approve**.

- 3 You can now click **Approve**. The next screen you will see shows an empty **My PR Approvals**

Rejecting a Requisition

Here are steps following on from Searching for a Requisition and assigning it to yourself.

- 1 After assigning a cart to yourself it will appear in the **My PR Approvals** box.



- 2 Click the requisition number to view the requisition.



Continued on next page...

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- 3 On the Requisition click on the **Available Actions** drop down.

Now select Reject Requisition at the bottom of the drop down list.

- 4 Type in a reason as to why the Requisition was rejected.

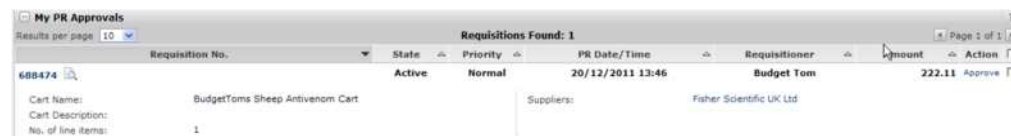
Click Reject Requisition.

Once the Requisition is rejected it can only be recovered by searching for the Requisition number in **Document Search** and then copying the contents of the rejected Requisition into a new cart. This can only be done by an Approver.

Rejecting an item from a Requisition

Here are steps following on from Searching for a Requisition and assigning it to yourself. Rejecting a Line item will not reject the Requisition, but will remove individual items from the Requisition.

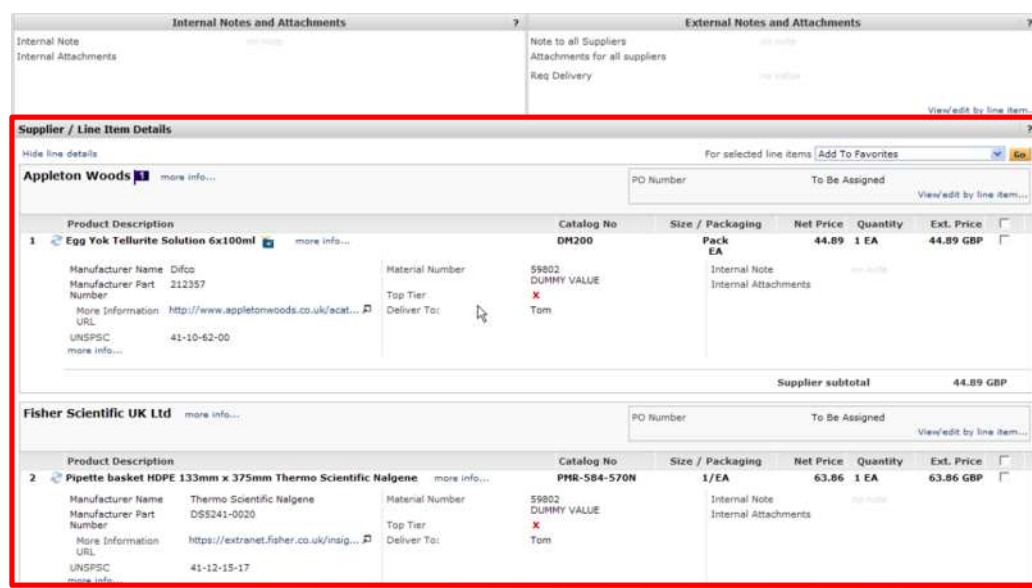
- 1 After assigning the requisition to yourself it will appear in the **My PR Approvals** box.



- 2 Click the requisition number to view the requisition.



- 3 Scroll down the Requisition to view the line items (the individual items in the Requisition).



Each item is separated by Supplier and has a tick box to the right of each item.

Continued on next page...

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- 4 Tick the box to the right of the item you wish to reject.

For selected line items Add To Favorites Go

PO Number To Be Assigned View/edit by line item...

Size / Packaging	Net Price	Quantity	Ext. Price	<input type="checkbox"/>
Pack EA	44.89	1 EA	44.89 GBP	<input checked="" type="checkbox"/>
Internal Note		no note		
Internal Attachments				

Supplier subtotal 44.89 GBP

- 5 Once the item tick box is ticked, click on the **For Selected Line items** drop down and select **Reject Selected Items** and click **Go**.

For selected line items Reject Selected Items Go

PO Number am...

Size / Packaging	Net Price	Quantity	Ext. Price	<input type="checkbox"/>	edit
1/EA	89.14	1 EA	89.14 GBP	<input checked="" type="checkbox"/>	edit
Internal Note		no note			
Internal Attachments		add attachment...			

- 6 Type in a reason for each line item to be rejected and click **Reject Line Item**.

Add Note ?

Reject Line Reason

1000 characters remaining expand | clear

Maximum allowed characters are 1000
Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Reject Line Item Cancel

Returning a Requisition

Here are steps following on from Searching for a Requisition and assigning it to yourself. Returning a Requisition will return it to the Shopper or Budget Holder for required changes.

- 1 After assigning the requisition to yourself it will appear in the My PR Approvals box.

Requisition No.	State	Priority	PR Date/Time	Requisitioner	Amount	Action
689474	Active	Normal	20/12/2011 13:46	Budget Tom	222.11	Approve

Cart Name: BudgetToms Sheep Antivenom Cart
 Cart Description:
 No. of line items: 1
 Suppliers: Fisher Scientific UK Ltd

- 2 Click the requisition number to view the requisition.

My PR Approvals
 Results per page: 10
 Requisition #
 689621
 Cart Name:
 Cart Description:
 No. of line items: 10

- 3 Click the **Available Actions** drop down and select **Return to Requisitioner** and click **Go**.

Available Actions: **Return to Requisitioner** Go

Options: ?
 ?
 edit

Billing

Bill To
 Univ. Central Acnts
 University of Warwick
 Kirby Corner Rd
 Coventry, West Midlands CV4 8UW
 GB GB

- 4 Type in a reason for the return with possible changes required.

Return to Requisitioner ?

Return the requisition to the requisitioner as a draft cart so they can correct errors and resubmit for approval.

Reason for return

1000 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

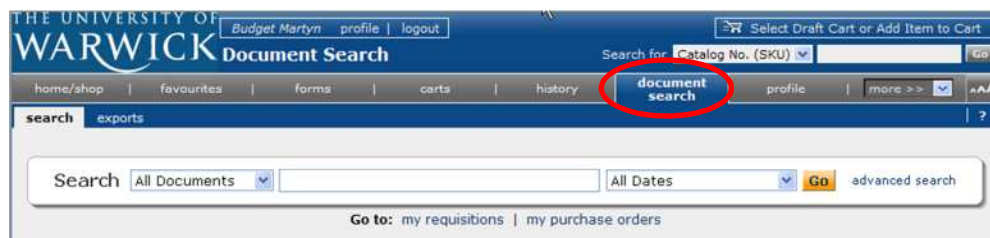
Return to Requisitioner Cancel

7. Document Search

Overview

OPeRA will keep copies of all requisitions and POs and these can be retrieved using the document search facility. Access is controlled by the document's access permissions and user's profile.

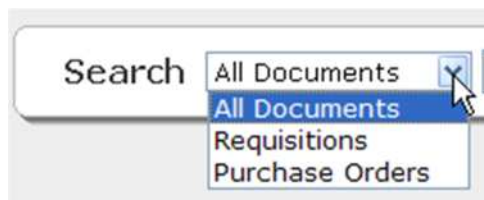
Click on the **document search** tab to access the search tool:



Basic search

To find Requisition and Purchase Orders OPeRA provides some simple but powerful tools. Search results can be further refined.

- 1 You can specify whether to search all documents, Requisitions or POs.



- 2 You can specify the date period to search. OPeRA has a wide range of predefined date options and you can specify a custom date range.

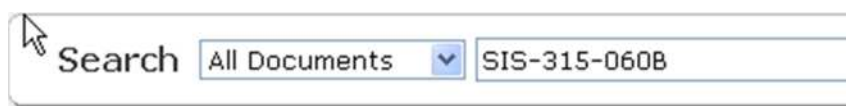


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- 3 You can search using any of the criteria listed below by typing into the search field (catalogue number used in example here) and clicking **Go**:

- requisition number
- requisition name
- purchase order number
- invoice number
- supplier invoice number
- invoice name
- catalogue number (SKU)
- product description (or partial product description)
- supplier name
- contract number
- manufacturer name
- receipt number for related PO
- receipt packing slip number for related PO
- receipt tracking number for related PO
- receipt name for related PO




NB: you can search on partial document numbers and don't need to use an asterisk (wild card).

- 4 To view the details of any requisition or PO returned by a search click on the **Requisition No** or **PO No**.

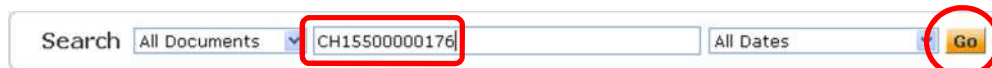


Alternatively, click on the

Quick View icon: 

Tip

If you know the requisition or PO number (as below) of the document you want then simply type it into the Search field and click on **Go**:



Viewing Documents

Clicking on a Requisition Number or PO Number will give you access to the document detail on multiple and layered tabs.

1 A Purchase Requisition document:

home/shop | favourites | forms | carts | history | document search | profile | more >> | AAA

search exports

Available Actions: Add Comment Go

Requisition PR Approvals Comments Attachments History

Summary Shipping Billing Cost Collector VAT Code External Notes and Attachments Supplier Info ?

Hide header Hide value descriptions

General	Shipping	Billing
Status ✓ Completed (03/01/2012 09:05) Submitted 21/12/2011 15:00 Cart Name More scissors for Lab 5 - Martyn Description no value Prepared by Budget Martyn Department Science Department Sub-Department Med School Only This field is only relevant for the Medical School PO Clauses 300 VAT-Life Sciences view all clauses - (1) Stop Order Delivery ✗ Charitable Advertising ✗ Medical Research ✗	Ship To University of Warwick Arden House Kirby Corner Rd Coventry West Midlands, CV4 7AL United Kingdom View/edit by line item...	Bill To Univ. Central Accts University of Warwick Kirby Corner Rd Coventry, West Midlands CV4 8UW GB GB Billing Options Accounting Date no value View/edit by line item...

Cost Collector	VAT Code	Other
Cost Collector Cost Center Internal Order Project Cost Center 00PKAA00 N/A N/A Physics: Main Account View/edit by line item...	VAT Code VAT Code VZ Zero Rated View/edit by line item...	Other Plant Purchasing Group PL01 CHEMISTRY CH1 Chemistry

Internal Notes and Attachments	External Notes and Attachments
Internal Note no note	Note to all Suppliers no note

2 A Purchase Order document:

home/shop | favourites | forms | carts | history | document search | profile | more >> | AAA

search exports

Purchase Order No. **CH15500000176 Revision 0**
 Supplier **Fisher Scientific UK Ltd**
 Available Actions: Add Comment Go

Status Purchase Order Revisions PO Approvals Comments Attachments History

Summary Shipping Information Accounting Codes VAT Code ?

Hide header Hide value descriptions

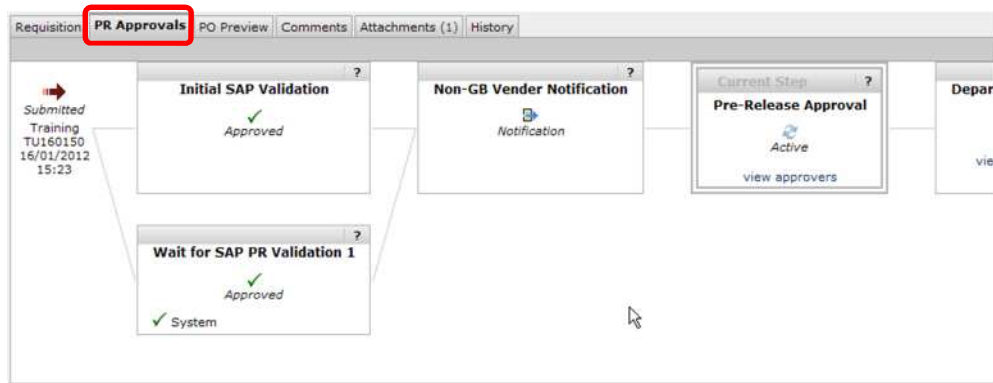
General Information	Shipping Information	Billing/Payment
Purchase Order No. CH15500000176 Revision No. 0 Priority Normal Supplier Name Fisher Scientific UK Ltd more info... Owner Science Department Department Med School Only This field is only relevant for the Medical School Address Bishop Meadow Road Loughborough Leicestershire, LE11 5RG GB Phone +1 (44) 01509 ext.231166 Supplier Fax No. +1 (44) 01509 ext.231893 Purchase Order Date 03/01/2012 Total 17.30 Requisition Number 689084 view print Stop Order Delivery ✗ Top Tier ✗	Ship To University of Warwick Arden House Kirby Corner Rd Coventry West Midlands, CV4 7AL United Kingdom ShipTo Address Code AH-01 Delivery Options Expedite ✗ Ship Via Best Carrier-Best Way Req Delivery no value View/edit by line item...	Bill To Univ. Central Accts University of Warwick Kirby Corner Rd Coventry, West Midlands CV4 8UW GB GB BillTo Address Code AA Billing Options Accounting Date no value Payment Terms F.O.B. N/A

Contact Information
Owner Name Budget Martyn

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- 3 Both types of document have an **Approvals** tab which displays in graphical format the progress of your PR/PO through OPeRA:



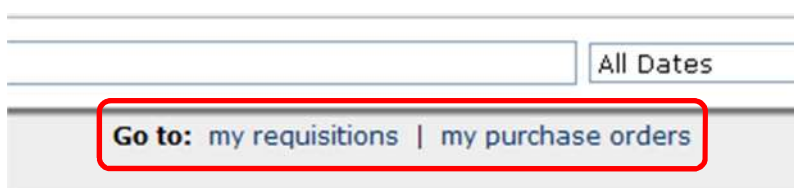
- 4 In the example above the PR has got as far as **Pre-Release Approval** and clicking on **view approvers** will produce a list of people you could contact to action this if necessary:



Searching for your Documents

If you are only interested in your requisitions and POs OPeRA allows you to quickly access these.

- 1 To view your requisitions or POs click on the appropriate link below the search field:



- 2 Clicking on **my requisitions** will give you a list of all your requisitions for the last 90 days:

Showing 1 - 3 of 3 results Last 90 days (07/10/2011 - 04/01/2012)					
Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total (GBP)
689621	Insight UK Onecall RS Components more...	Re-equip lab 3 - MP	Budget Martyn	04/01/2012 12:18	478.23
689084	Fisher Scientific UK Ltd	More scissors for Lab 5 - Martyn	Budget Martyn	21/12/2011 15:00	17.30
688505	Fisher Scientific UK Ltd	Lab Scissors	Budget Martyn	20/12/2011 15:07	0.00

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- 3 Clicking on **my purchase orders** will give you a list of all your POs for the last 90 days:

Showing 1 - 1 of 1 results Last 90 days (07/10/2011 - 04/01/2012)

Results per page: 20 Sort by: Best match Page 1 of 1 ?

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	PO Total (GBP)	
✓ CH15500000176	Fisher Scientific UK Ltd	03/01/2012 09:05	689084	Budget Martyn	Sent	17.30	

Filtering Results

Once a search has been executed and the results are displayed, it is still possible to apply further filters and amend the sort criteria:

- (1) Any document list can be sorted by a number of criteria using the **Sort by** field at the top of the list.



- 2 Any search results can be further refined using the **Refine Search Results** panel down the left of the screen.




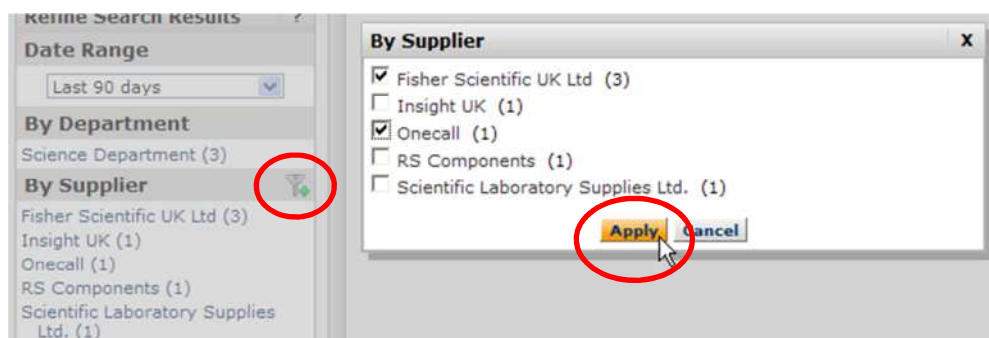
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- 3 To apply a filter using one criterion simply click on it.



- 4 To apply a filter using multiple criteria click on the appropriate **Filter** button , select the criteria you require, then click **Apply**:



- 5 Applied filters will be displayed in the **Filtered By** panel and can be removed by un-ticking the boxes.

*Note that in this case if you wanted to filter by another supplier you must first remove all the 'Supplier' filters before the **By Supplier** option reappears in the **Refine Search Results** panel.*



Saving a Search

To save search criteria that you regularly use follow the steps below:

- 1 Once you have selected all the required criteria and have your search result click on **Save Search** in the **Filtered By** panel.

Search Terms

Search Type
My Requisitions Search

Owner
Budget Martyn

Filtered By

Type: Requisitions
Date Range: Month-To-Date [remove all]

Department
☒ Science Department

Supplier
☒ Fisher Scientific UK Ltd

Save Search **Export Results**

- 2 Name your search, add a description, then click on **Save**.

Save Search Results

Name: Fisher Scientific Monthly Order

Description: Items Ordered from Fisher Scientific this month.

expand | clear

Save **Cancel**

- 3 Click on **Close**.
- 4 If you have saved searches the **saved searches** option appears at the top of the tab:

forms | carts | history | **document search** | prot

start new search Go to: my requisitions | my purchase orders | **saved searches**

- 5 To see saved searches click on the link indicated in Step 4 and a list will appear:

Saved Searches

My Saved Searches

Fisher Scientific Monthly Order	export rename delete
Fisher and Onecall	export rename delete

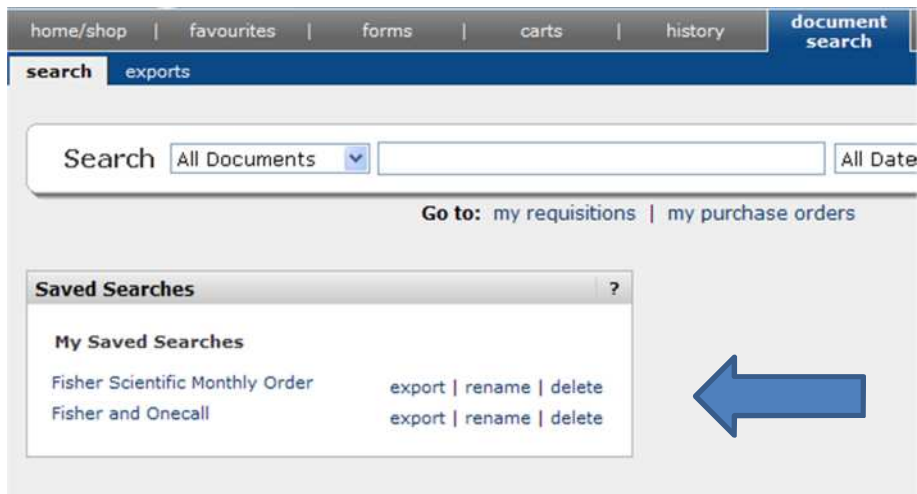
Close

NB: Saved search looking for both PR and POs will not have the **export** option.

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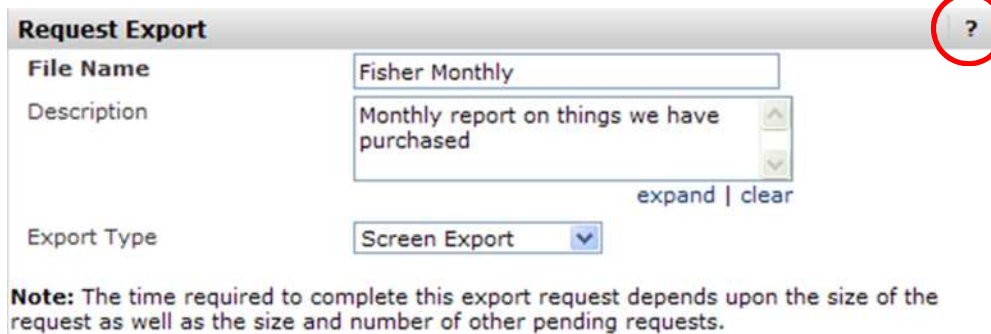
- 6 Any saved searches also appear on the **document search** tab:



The screenshot shows the 'document search' tab in a web application. At the top, there are navigation links: 'home/shop', 'favourites', 'forms', 'carts', 'history', and 'document search'. Below these, there are tabs for 'search' and 'exports'. A search bar is present with a dropdown menu set to 'All Documents' and a text input field. To the right of the search bar is a link 'All Date'. Below the search bar, there are links 'Go to: my requisitions' and 'my purchase orders'. A section titled 'Saved Searches' contains a table of saved searches. A blue arrow points to the 'export | rename | delete' links for each search.

My Saved Searches	
Fisher Scientific Monthly Order	export rename delete
Fisher and Onecall	export rename delete

- (7) You can delete, rename or export any search wherever you see those options listed opposite your saved search. Any export will create a zipped Excel file and if you click on the help icon in the **Request Export** dialogue box you will find an explanation of your export options:



The screenshot shows the 'Request Export' dialogue box. It has a title bar with a question mark icon circled in red. The form contains the following fields:

- File Name:** Fisher Monthly
- Description:** Monthly report on things we have purchased
- Export Type:** Screen Export

Below the description field, there are links 'expand' and 'clear'. At the bottom, there is a **Note:** The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.

Advanced Search

This can be useful if you need to search for documents from multiple departments or to check spend against a particular Cost Centre or Project. Advanced Search provides a wide range of search options.

The example below shows you how to search for all Requisitions raised against a particular Cost Centre over the last month.

- 1 On the **document search** tab click on **advanced search**:

A screenshot of a search bar with a dropdown menu set to 'All Dates', a 'Go' button, and a button labeled 'advanced search' which is circled in red.

- 2 The advanced search form then appears:

A screenshot of the advanced search form. It includes sections for 'General Document Identification' (Document Number), 'Document Information' (Owner, Date, Department), and 'Supplier/SKU Information' (Supplier, Catalog Number(SKU), Product Description). There is a 'Go' button at the bottom. At the very bottom, it says 'Go to: my requisitions | my purchase orders'.

- 3 Select **Requisitions** from the document options.

A screenshot of the document type dropdown menu. The options are 'All Documents', 'All Documents', 'Requisitions', and 'Purchase Orders'. 'Requisitions' is highlighted, and the dropdown arrow is circled in red.

- 4 Select the required date range:

A screenshot of the date range dropdown menu. The options are 'All Dates', 'Days', 'Last 7 days', 'Last 30 days', 'Last 60 days', 'Last 90 days', 'Last 120 days', 'Yesterday', and 'Today'. 'Last 30 days' is highlighted, and the dropdown arrow is circled in red.

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- 5 Scroll down to 'Custom Fields' at the bottom and entre the appropriate Cost Centre:

Custom Fields

Cost Collector	Is Exactly ▼	<input type="text"/>	Add another Cost Collector
Select from profile values... Select from all values...			
Cost Center	Is Exactly ▼	<input type="text"/>	Add another Cost Center
Select from profile values...			
Deliver To:	Is Exactly ▼	<input type="text"/>	Add another Deliver To:
Select from profile values...			
Hazard Level	Is Exactly ▼	<input type="text"/>	Add another Hazard Level
Select from profile values... Select from all values...			

Go

N.B: You can add additional Cost Centres.

- 6 Click on **Go**.

8. Miscellaneous

Overview

In this section you will find guidance on how to use a number of useful features in OPeRA, how to change some key defaults, and how to carry out certain required actions.

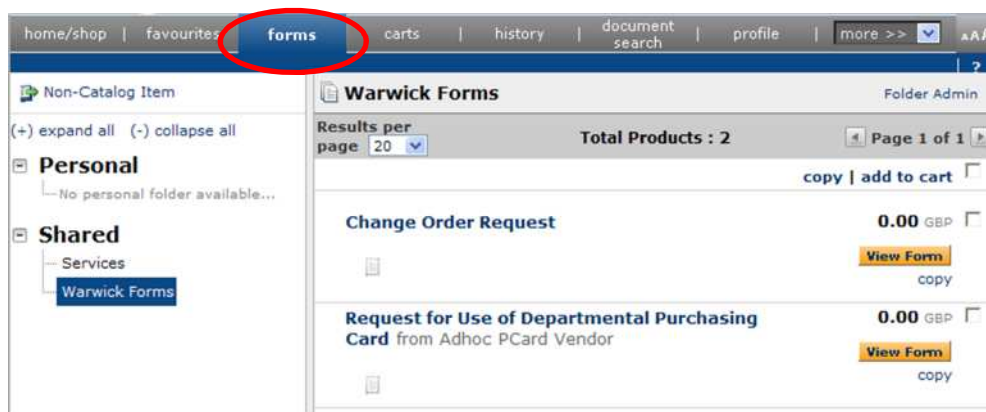
Forms

Forms have been created to make it easier to order or request services such as courtesy cars or change order requests.

- (1) If you are ordering a service such as a courtesy car the form will place it into a cart and you will then need to process the requisition as normal. Therefore, either make sure your active cart is the one you want the service to be added to or create a new draft cart and give it an appropriate name:

Name this cart:

- 2 Forms are accessed via the forms tab where a list of available forms appears on the left of the screen categorised as **Personal** or **Shared**:



- (3) Alternatively, you may be able to access forms via the **Showcased Services** area on the home page.



- 4 To open a form either click on its name or click on its **View Form** button.

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- 5 The form will open in a new window:

- 6 Any instructions or guidance associated with the form will appear down the left hand side.

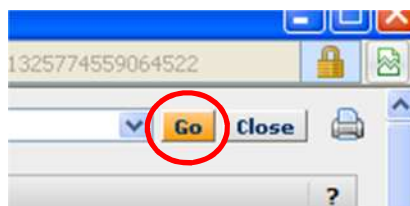
- (7) You can use the dropdown at the top of the form to change the default action.

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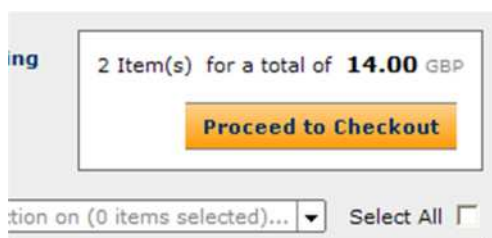
8 Complete the necessary details on the form.

9 When completed click on **Go**.



(10) If the form was purchasing a service (e.g. taxi) and you used the default **Add and go to Cart** action (see Step 6 above) the service will now be added to the active cart or a new cart will be created.

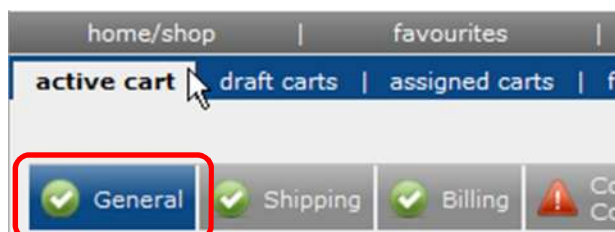
(11) Click on **Proceed to Checkout** and complete the requisition as normal.



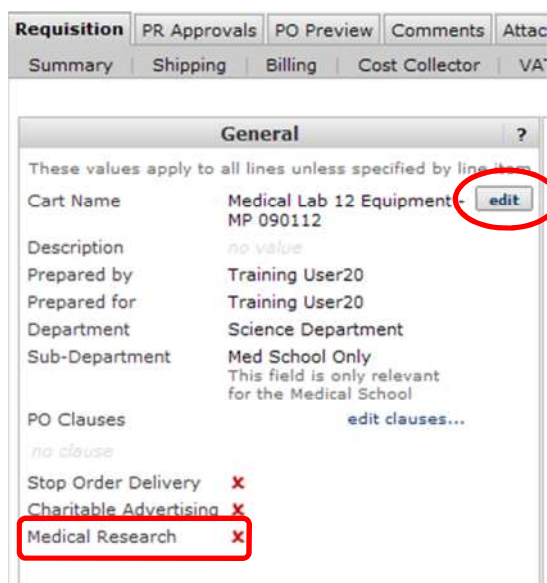
Medical Research Flag

If any item in an OPeRA cart triggers the Medical Research flag the cart must not also contain any items that would also trigger that flag. To activate the Medical Research flag follow the procedure below.

1 After clicking on **Proceed to Checkout** select the **General** step.



2 On the **General** panel you will find the 'Medical Research' flag which is inactive by default. To switch it on click on **edit**.



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...continued from previous page.

- 3 Tick the 'Medical Research' box and then click on **Save**.

Stop Order Delivery ☐
 Charitable Advertising ☐
 Medical Research ☒

Save **Cancel**

- 4 The flag is now active.

Stop Order Delivery ☒
 Charitable Advertising ☒
 Medical Research ☒

Hazardous Flag

If items are classed as hazardous they need to be flagged accordingly in OPeRA which will route the Purchase Requisition through Health and Safety.

The default 'Hazard Level' for all items in OPeRA is "Not Hazardous" and this needs to be changed manually by the Shopper or the Budget Holder before requisition is raised (Order Placed). To activate the Hazardous flag follow the procedure below.

- (1) Hazardous items should appear in search results from the hosted catalogues with the **Hazardous material** icon.

Items from a Punch-out and non-catalogue items will not have this icon and the Shopper and/or Budget Holder should know which items are hazardous and flag appropriately.

Hydrochloric acid solution 0.9090g
 Part Number 13370-0
 Manufacturer Info 1337000
 Core List Item Yes
 Dry Ice Yes
 CAS Number 7647-01-

Product Flags
 Hazardous material
 Core List Item
 Dry Ice

- 2 After proceeding to checkout with your cart select the **Final Review** step.

External Notes and Attachments **Final Review**

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...continued from previous page.

- 3 Scroll down until you find the hazardous item and note it's 'Hazard Level' will be "Not Hazardous":

Fisher Scientific UK Ltd [more info...](#)

Add non-catalog item for this supplier...

Product Description	Catalog No	Size / Packaging	Net Price	Quantity	Ext. Price	
4 Hydrochloric acid solution 0.9090g/mL 5N to 6N more info...	13370-0010	1L EA	18.02	1 EA	18.02 GBP	edit

Manufacturer Name: Acros Organics
 Manufacturer Part Number: 133700010

Material Number: no value
 Hazard Level: Not Hazardous
 Deliver To: Test User

Internal Note: no note
 Internal Attachments: add attachment...

- 4 To change the level click on the **edit** button for this line item.

PO Number To Be Assigned
[View/edit by line item...](#)

ng	Net Price	Quantity	Ext. Price	
	18.02	1 EA	18.02 GBP	edit

no value Internal Note: no note
 Not Hazardous Internal Attachments

- 5 Click on **Select from all values**.

Hazard Level: Not Hazardous
[Select from profile values...](#)
[Select from all values...](#)

- 6 Use the dropdown to select the appropriate level.

Hazard Level: Not Hazardous
[Select from profile values...](#)
[Hide all values](#)

Deliver To: 1-Low
 2-Medium
 3-High
 Not Hazardous

- 7 Click on **Save** and note the new hazard level..

Material Number: no value
 Hazard Level: 2-Medium
 Deliver To: Test User

Attachments

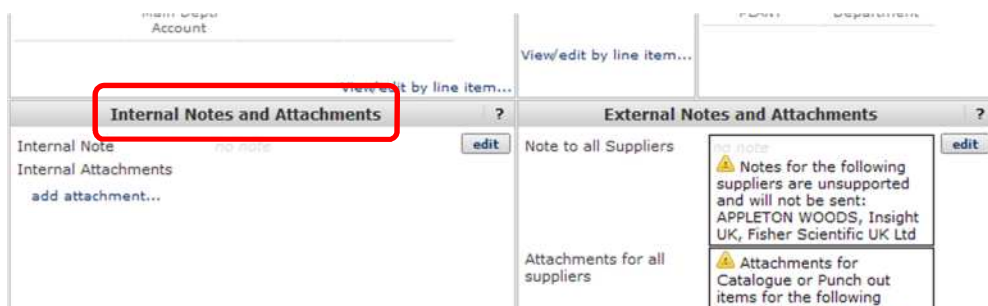
You may need to add an attachment to a requisition, such as quotes, terms and conditions etc. Internal attachments are only seen by UoW. External attachments go to the supplier. When adding attachments to a cart they can be added at the cart level (Header) which means they apply to all items in the cart, or at line item level if they only apply to certain items within the cart.

Particular care must be paid with External attachments if the cart contains multiple items from multiple suppliers. If the attachment only applies to certain items these must be attached at line item level because if you attach them at cart (Header) level every supplier will get a copy.

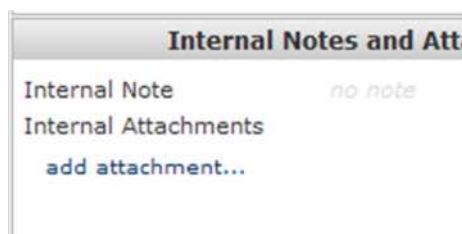
- 1 After clicking on **Proceed to Checkout** go to the **Final Review** step:



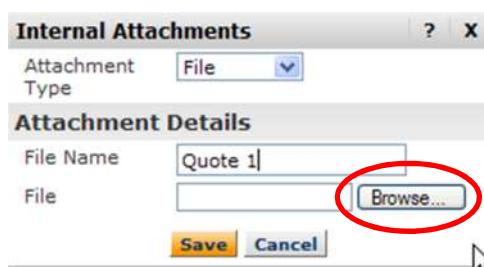
- 2 Scroll down until you see the **Internal Notes and Attachments** section of the Header:



- 3 Click on **add attachment** to open the **Internal Attachments** dialogue box.



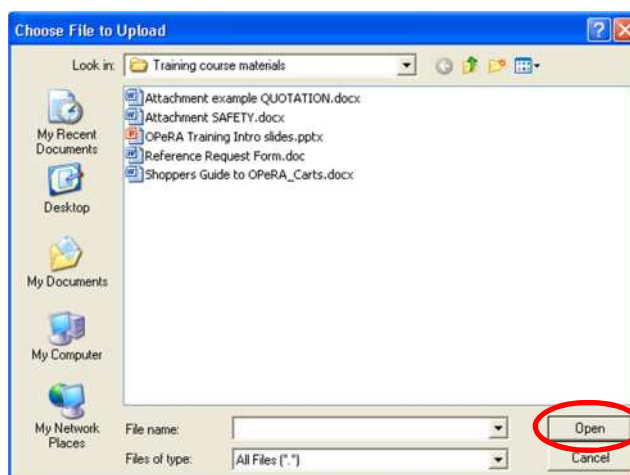
- 4 Enter an appropriate name into the 'File Name' field and then click on the **Browse** button.



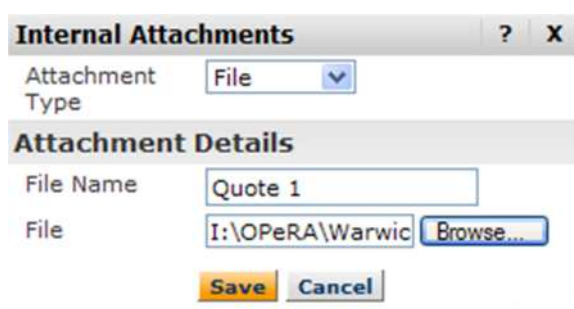
Continued on next page...

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- 5 The **Choose File to Upload** dialog box opens. Navigate to where the document you wish to upload is located in your filing system, select it and click on **Open**.



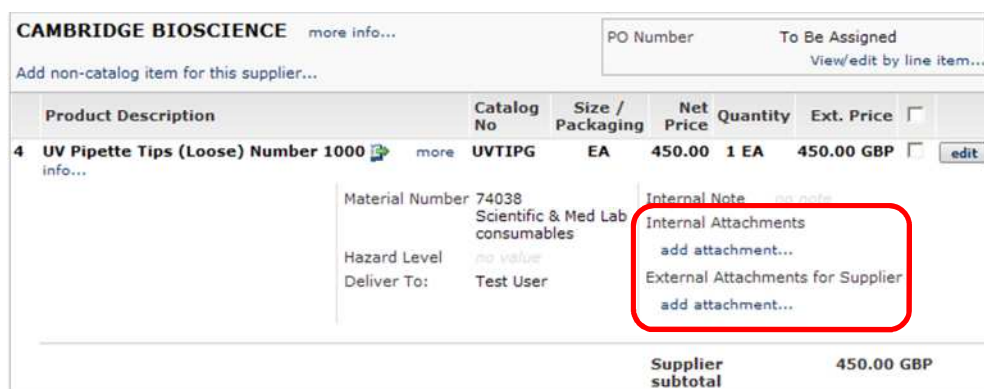
- 6 Click on **Save**.



- 7 Your attachment is listed. Repeat Steps 3-6 to add further attachments. Any attachment can be removed by clicking on its **remove** link.



- (8) If the attachment does not apply to every item in the cart, it can be attached at the line item level. Scroll down until you find the relevant line item and you will see the links on the right:



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- (9) Click on **add attachment** under 'Internal Attachments' and follow Steps 4-6 above.

Size / Packaging	Net Price	Quantity	Ext. Price
EA	450.00	1 EA	450.00 GBP

Internal Note: no note

Internal Attachments

add attachment...

External Attachments for Supplier

add attachment...

NB

External Attachments can only be used with Non-catalogue items.

However, if you do need to use an external attachment with an item from the catalogue this can be achieved by processing it as a non-catalogue item.

The process for adding external attachments is the same as for internal attachments but remember if there are multiple suppliers in the requisition they will all receive an external attachment if you add it at the Header level, so attaching at the line level is likely to be more appropriate.

Catalogue and Punch-out items cannot have External attachments and you will see a warning similar to this:

Internal Note: no note

Internal Attachments

add attachment...

External Attachments for Supplier

Supplier does not support attachments

Default Cost Codes

If you regularly use the same Cost Code for most or all of your purchasing then OPeRA allows you to define this as your default code (or create a list of commonly used codes) to save you having to enter it every time. Note that defining a default Cost Code does not prevent you from manually changing the code in any given order.

- 1 Click on the **profile** tab.

Search for: Catalog No. (SKU)

search profile

Change Passw

- 2 In your profile click on the **Purchasing** tab.

User Settings **Purchasing** Permissions History

User Identification Personal Settings Roles

First Name

Continued on next page...

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- 3 Click on the **Codes** tab.



- (4) You may first need to set the Cost Collector default to Cost Centre. Click on **Edit** adjacent to the 'Cost Centre' field name:

Header (int.) Delivery Codes Code Favorites Cart			
Custom Field Name	Default Value	Description	Edit Values
Cost Collector	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ Project	No Default Value		Edit
Plant	No Default Value		Edit

- (5) Select **Cost Centre** and this will trigger the **Edit Existing Value** panel to the right. Tick the 'Default' box and click **Save**:

Custom Field Name	Default Value	Description	Edit Values
Cost Collector	No Default Value		Edit

Edit Values **Close**

Create New Value

Value	Description
Cost Center*	
Internal Order*	
Project*	

Edit Existing Value ?

Value	Cost Center
Description	
Default	<input checked="" type="checkbox"/>
Status	active

Save

- (6) You will see Cost Centre is now set as the default value. Click on **Close**:

Header (int.) Delivery Codes Code Favorites Cart			
Custom Field Name	Default Value	Description	Edit Values
Cost Collector	Cost Center		Edit

Edit Values **Close**

Create New Value

- 7 Next click on **Edit** adjacent to the 'Cost Centre' field name:

Custom Field Name	Default Value	Description	Edit Values
Cost Collector	Cost Center		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit

Continued on next page...

...continued from previous page.

- 8 Click on **Create New Value**:

- 9 In the **New Value** panel add your cost code to the 'Value' field and tick the 'Default' box.

The 'Description' will be imported from SAP.

Click on **Save**.

- (10) Repeat Steps 8 & 9 to create a list of your frequently used Cost Codes, one of which may be set to default, but all will appear as dropdown options at checkout.

- 11 Click on **Close**.

- 12 You will see the cost code is now set as the default value:

Custom Field Name	Default Value
Cost Collector	Cost Center
└ Cost Center	00CHXX00
└ Internal Order	

VAT

There may be occasions where you need to change the VAT code for items in a cart. If all items in the cart have the same VAT code this can be changed at the header level and will apply to the entire cart. Alternatively, you can change the VAT code for specified items in a cart leaving the rest with the default VAT code.

VAT code VZ cannot be mixed with non VZ coded items in a cart.

- 1 After clicking on **Proceed to Checkout** select the **VAT Code** step.

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- (2) If all items in the cart are to have the same VAT Code, change the code in the header by clicking on **edit** in the VAT Code panel.

- 3 Click on 'Select from all values...'

- 4 Use the dropdown to select the VAT Code you require.

- 5 Click on **Save**.

Continued on next page...

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- (6) The VAT Code panel reminds you that the code displayed here applies to all lines unless specified by line item.

- (7) If you need to change the VAT code for only some items, scroll down until you can see the line item and click on the 'VAT Code' **edit** button for that item:

- (8) Repeat Steps 3 to 5 above.
- (9) The note for the VAT Code on this line reminds you that the code has been overridden for this line.
- Clicking on **copy to other lines** allows you to quickly apply the same VAT Code to other line items.*

NB In Step 3 above there is the option to split the allocation of VAT.

The VZ VAT Code cannot be used in any split.

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Select the options required and note you can add further splits if necessary.

VAT splits can be applied to the whole cart, as here, or to individual line items within a cart.

VAT Code	% of Price
V0 Exempt	25%
V9 Reduced Rate 5%	40%
V1 Standard Rate	35%

Chemical Drawings OPeRA has a Chemical Structure Search facility to facilitate finding chemicals. Follow the steps below to use it.

- 1 To access the chemical search facility click on the **chemicals** link found on the **home/shop** page:

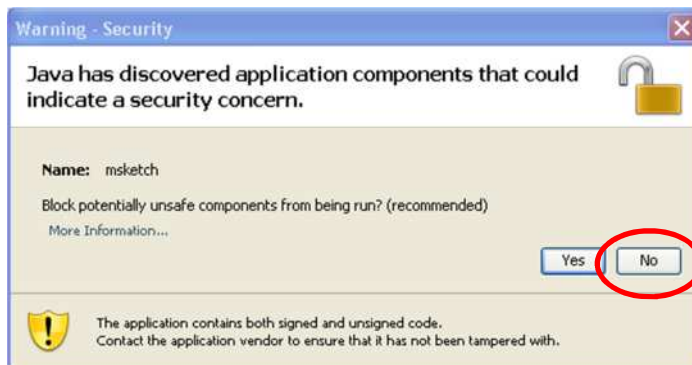
Continued on next page...

...continued from previous page.

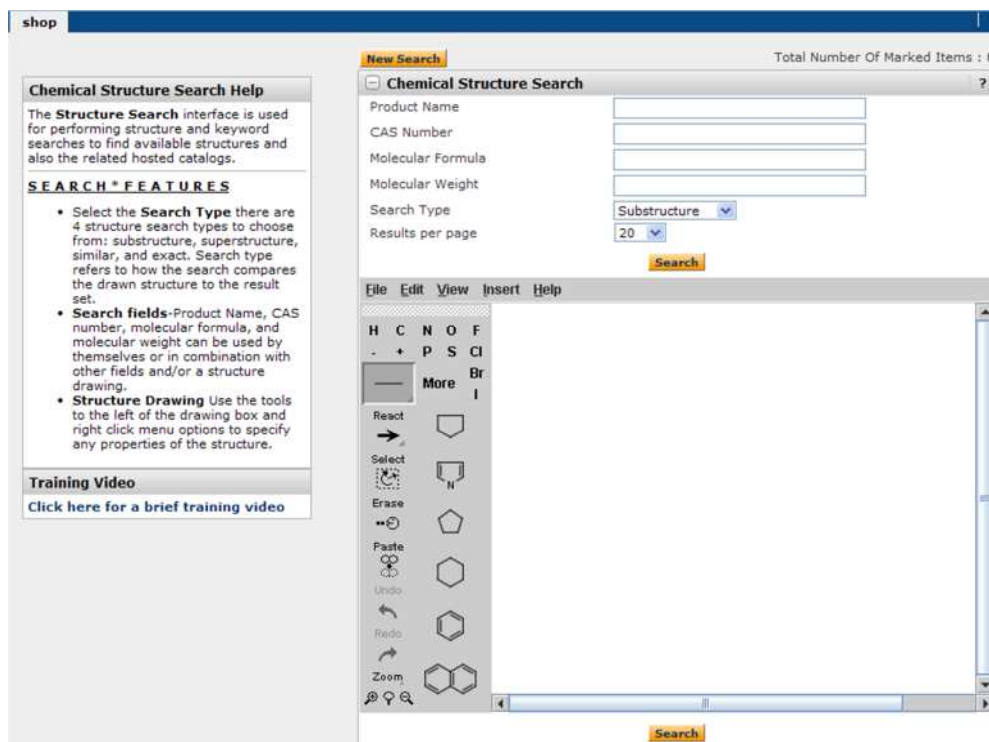
- (2) You may receive a message like the one below. If so, click **Run**:



- (3) You may also see the following **Warning** message about Java. If so, click **No**:



- 4 The **Chemical Structure Search** will load after a short delay:

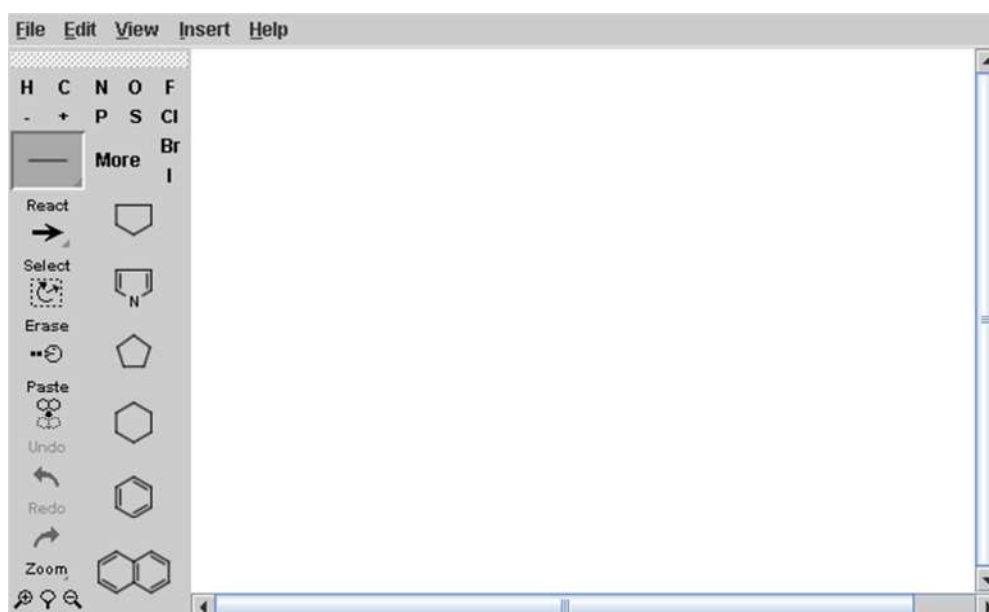


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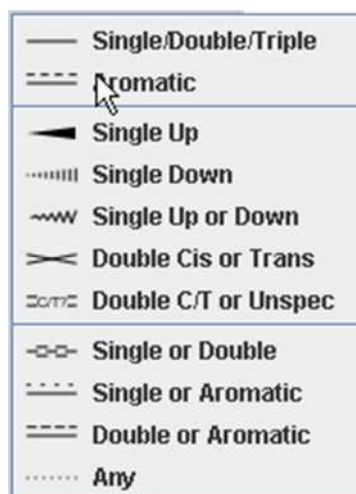
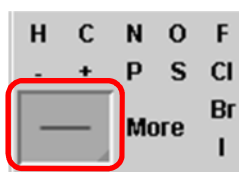
...continued from previous page.

- 5 Use the top section for a categorical search:

- 6 Use the section below to draw a chemical structure:



- 7 Draw with single bonds or increase bond type is a tool which has multiple tools accessible with a click and hold:



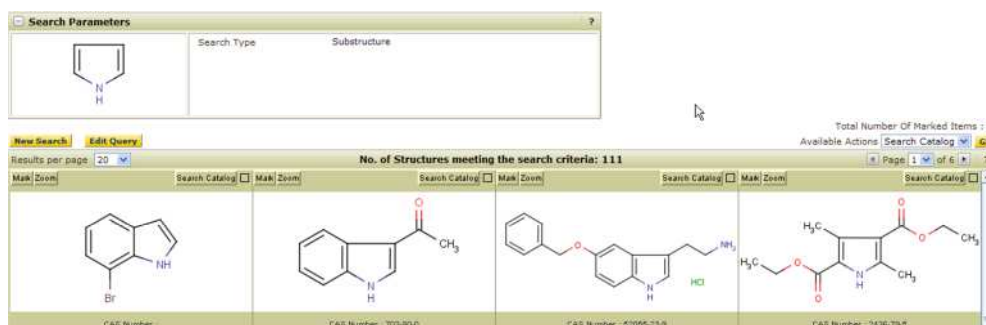
Continued on next page...

...continued from previous page.

- 8 The structure palette is simply click and select but there are also tools which allow you to hold down the left mouse button to access other tools and structures

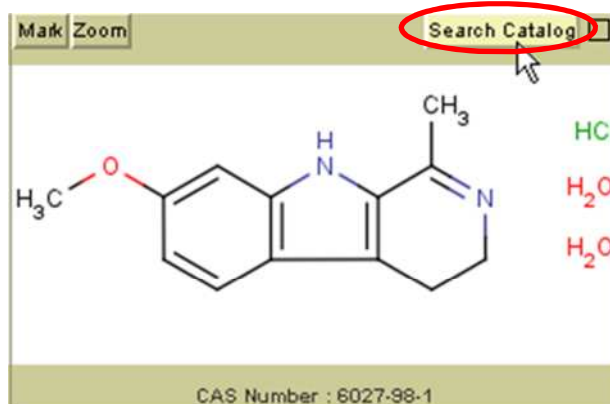


- 9 Either use the tools to create a structure or use the categorical search above. In either event when finished click on **Search**.
- 10 The results will show the search parameters at the top and the results below:



- 11 To select a chemical structure click on **Search Catalogue** in the top right hand corner of a chemical structure box.

This will take you to a typical search results page where the you can add to your cart as normal.



9. Appendix

Overview

Below you will find a glossary of common OPeRA terms and a list of icons you will see in the system.















Glossary









Administrator	These are system administrators and can make changes to site configuration, user information, suppliers, etc.
Approver1-read	These users can review (approve and reject) purchase requisitioners that are assigned to them. Typically this role is assigned to the Top Tier, Specialist and Department Release Approvers. This role CANNOT modify a requisition in workflow.
Approver2-write	These users can review (approve and reject) purchase requisitioners that are assigned to them. Typically this role is assigned to the Pre-Release Approvers. This role CAN modify a requisition after they have assigned it to themselves.
Budget Holder	These users can shop for items and submit carts (that they created or from a shopper). They are responsible for making sure the correct Cost Collector values are populated
Cart	Carts are found in all online shopping, including SelectSite. A cart is the entity that holds details about the items(s) or services that you would like to order. Prior to submitting a cart, you can add additional items, change items, remove items, change quantities, etc. Funding is not attached or “reserved” for a cart – meaning carts do not have a PO number, PR number, or money from a credit card reserved. Once you hit submit, the financial association begins. (This works just as it does when you are shopping online). Once the cart is submitted, it becomes a purchase requisition.
Custom fields	Used to track information specific to an organization. Custom fields can be used to identify financial information associated with an order, used to assign a buyer, or can be used to identify Yes/No or On/Off type information. The number of custom fields, along with the custom field type, varies based on your organization’s needs. Custom fields can display in a number of different locations on a purchase requisition or purchase order. Depending on how the custom field is set up and what permissions are assigned to the users, a custom field can be viewable only by certain users/roles, can be freeform entry, can be selected from an administrator defined list, or can be pre-selected for the user by an administrator. NOTE: In the cases where a user is given view-only privileges for a custom field, he/she will still be able to assign the default value.
Hosted Catalogue	Hosted catalogues are an electronic form of a supplier’s printed catalogue. Suppliers provide information for the items that they sell and put this into a spreadsheet. This information is then loaded into the system where it can be viewed by shoppers and requisitioners. Generally, organization-specific pricing is applied to a hosted catalogue

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Non-Catalogue	A non-catalogue item indicates the item is not available via a hosted catalogue or punch-out catalogue. OPeRA knows nothing about the item being requested and it is the requisitioner's responsibility to accurately describe and price the item.
Punch-out Catalogue	<p>A Punch Out catalogue is held on the supplier's own website and may or may not be a section of their website tailored to University of Warwick approved products and / or pricing. Items are selected via the Punch Out facility and brought back into the OPeRA environment. The Requisition is created and approved within the OPeRA environment.</p> <p>This experience is very similar to shopping directly from a supplier's website except: 1) you will only see those items that you can order, 2) you will see organization-specific negotiated pricing,</p>
Purchase Order (PO)	A purchase order is simply that, your order to purchase goods or services. A purchase order is a binding contract. It contains the name and/or description of the goods you are buying, as well as the quantity, price, payment, and delivery terms. Many wholesale distributors and vendors will insist on a purchase order before they sell to you.
Purchase Requisition (PR)	Once a cart is submitted, it becomes a Purchase Requisition (PR). During the Purchase Requisition phase, the funding for the purchase is oftentimes validated (Is the credit card number valid? Can the user "use" the account entered? Is there is enough money for this purchase?) AND the approval process is initiated. Once a Purchase Requisition is fully approved and complete, it becomes a Purchase Order
Purchasing	These users can be responsible for approving high dollar orders or managing supplier content.
Shopper	These users can shop for items, but cannot submit a cart. These users may know Cost Collector values, the correct Material Number and VAT code, but they are not required assign the cart to a budget holder. Shoppers should not populate any fields they are unsure of.

Icon Guide		
		Organisation Favourite - Item offers additional discount and / or best value across a range of suppliers on a contract. Item should be purchased in preference to like alternatives.
		Core Item - Item is benefitting from extra University of Warwick discount. Item should be purchased in preference to like alternatives.
		Duty Applies - Indicates that the item being purchased may attract additional duty charges e.g. ethanol. Duty charges are separate and in addition to any VAT charges. In most cases, such charges will be added to the invoice by the supplier.
		Form – Item is a form which can be filled in and added into a cart.
		Service – Item is a service such as ordering a taxi or catering and is filled in as a form.
		Dry Ice - Indicates that the item being purchased may be delivered on dry ice and may incur such additional charge. In most cases, charges will be added to the invoice by the supplier.
Requisition Symbols		Requisition Approved – The Requisition is approved by Approver.
		Requisition Rejected - The Requisition is Rejected by Approver
		Requisition Withdrawn - The Requisition is Withdrawn by Budget Holder
		Requisition Pending Approval - The Requisition is being considered by Approver
		Requisition Quick View – A quick way of viewing a Requisition instead of going to the Requisition Page
		Approved Supplier, 1st Rank Preference - The supplier is approved on a University of Warwick Agreement and has a rank of 1. Similar icons may be seen indicating the number 2, 3, 4 etc. for the 2 nd , 3 rd , 4 th etc. ranked suppliers on multi supplier ranked agreements
		Non-Catalogue Item – Can be found next to an item in a cart or on a Requisition to indicate that it is a non-catalogue item i.e. has not be selected via a catalogue search. Non catalogue items are created via the Non Catalogue Item route.
		Hosted-Catalogue Item / Supplier – Can be found next to an item in a cart or on a Requisition to indicate that it is included in a hosted supplier's catalogue and has been selected from the catalogue. Can be found next to the supplier in the Supplier Search to indicate that the supplier has a hosted catalogue. A hosted catalogue is held within the OPeRA system environment itself

		Punch Out Item – Can be found next to an item in a cart or on a Requisition to indicate that it is included in a Punch Out supplier's catalogue and has been selected from the catalogue. A Punch Out catalogue is held on the supplier's own website and may or may not be a section of their website tailored to University of Warwick approved products and / or pricing. Items are selected via the Punch Out facility and brought back into the OPeRA environment. The Requisition is created and approved within the OPeRA environment.
		Science Catalogue – This functionality is not used by the University of Warwick at the moment and the icon can be ignored
		Print – Can be found above requisitions and certain other pieces of information that OPeRA presumes the user may wish to print.
		Warning – Can be found within Requisitions and Approvals lists to indicate a current or potential problem.
		Item has image – An image of the item.
		Favourite – An item which has been added to the user's personal favourite's folder
		Link Pop-out – Next to a weblink which when clicked on will open the page in another browser window.
		Supplier's catalogue flag to indicate a Hazardous item - These flags are set by the hosted catalogue suppliers only. The University of Warwick will not be relying on such flags to inform the approval of or reporting of hazardous, harmful or controlled substances. Please refer to guidance on procedures for the purchase of Hazardous materials or seek advice from your departmental administrators or departmental OPeRA system superuser.